



Values-Based Major Giving Academy

Module 4: Build Trust

Review Action Learning

- Complete your Gap Message Worksheet
- Practice sharing the gap



Values-Based Major Giving

- Identify Supporters
- Choose Donors
- Create the Environment
- Build Trust**
- Agitate with Love
- Make the Ask
- Engage with Gratitude



Module 4: Build Trust

Learning Objectives

After this session, you will be able to:

1. Understand the purpose of cultivation as moving donors closer to making a financial contribution by learning about the donor's values and giving and by sharing what it takes to achieve the organization's mission.
2. List at least five money questions you could ask your donors.
3. Create cultivation plans for donors you are in one-to-one relationships with.



What Is Values- Based Cultivation?

Module 4: Lesson 1





Values-Based Cultivation

The steps you take with a donor to move them from having the intention to give to taking action to give.





From left: Hale Zukas, Ron Washington, and Judy Heumann respond to a question at a press conference held at the San Francisco airport before protesters leave for Washington. Lynette Taylor provides American Sign Language interpretation.

San Francisco Examiner Archive. Courtesy of the Bancroft Library, University of California, Berkeley., via NPS.gov.

What makes Values-Based Cultivation different?

- Purpose-driven
- Power is held in community
- Mission focus
- Building trust around shared values



Purpose- Driven It's about you.



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Power is held in community



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Mission- Focused



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Build Trust Around Shared Values



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90 Second Pause





Money Questions

Module 4: Lesson 2





Money Questions

The questions a fundraiser asks a donor to learn about their values, their giving interests, their resources, and how they make giving decisions.



What do you need to know from the donor before you can ask for a gift?



Why they give to your organization

- Why did you make your last gift?
- Where does our organization fall in your giving priorities?
- How does our organization's work make your life better?



Why they make financial gifts

- What other organizations do you support?
- What was the first financial contribution you ever made?
- Would you like to hear about another organization that aligns with your values?



How they make giving decisions

- Who do you consult with when making giving decisions?
- What are the values that drive your giving decisions?
- Do you have any family traditions related to giving?



How they give

- When do you like to give?
- How do you prefer to make financial gifts?
- Do you want to give the funds in your DAF away while you're alive?



How they think about money

- Where did your family's money come from?
- If you won the lottery, what would you do with the money?
- Do you want to pass on wealth/money to your children?



How they feel about fundraising

- Have you ever raised money for something you care about?
- Do you think we can raise enough money?
- Who else do you think should be involved to raise the money it will take?



90 Second Pause





Cultivation Planning

Module 4: Lesson 3



Planning to Build Trust



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Cultivation Plans are Dynamic

Cultivation Plan Elements

- Ask amount
- Ask type
- Expect amount
- Expect type
- Closing date
- What you need to know
- Next 1-3 actions





Ask Amount Ask Type

- The amount you **plan to ask** the donor to give based on the information you have right now
- **How you'll ask them to make the gift**, e.g. one-time gift, recurring gift, multi-year commitment

Expect Amount Expect Type

- How much you think the donor **will likely give**
- **How you'll think they'll give it**, e.g. one-time gift, recurring gift, multi-year commitment



Closing Date

- Date by which you expect to have a **documented commitment** recorded in your donor database or the **gift** recorded in your database and deposited in the bank





Money Questions

- Which **money questions** do you need answered before you can ask for the gif?

Actions

- The next 1-3 things you'll do to engage the donor.
- **Only the next 1-3.**

Tracking Your Plans



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Cultivation Actions

- Meetings
- Emails
- Text Messages
- Post Cards
- Phone Calls
- +++

Use what you have

“I noticed you had tickets to Sunday’s performance. I’m curious to hear what you thought. Did the play challenge you to think about anything in a new way?”





Let your mission shine

Cultivation Toolbox Worksheet

Cultivation Toolbox



Values-Based Major Giving Academy

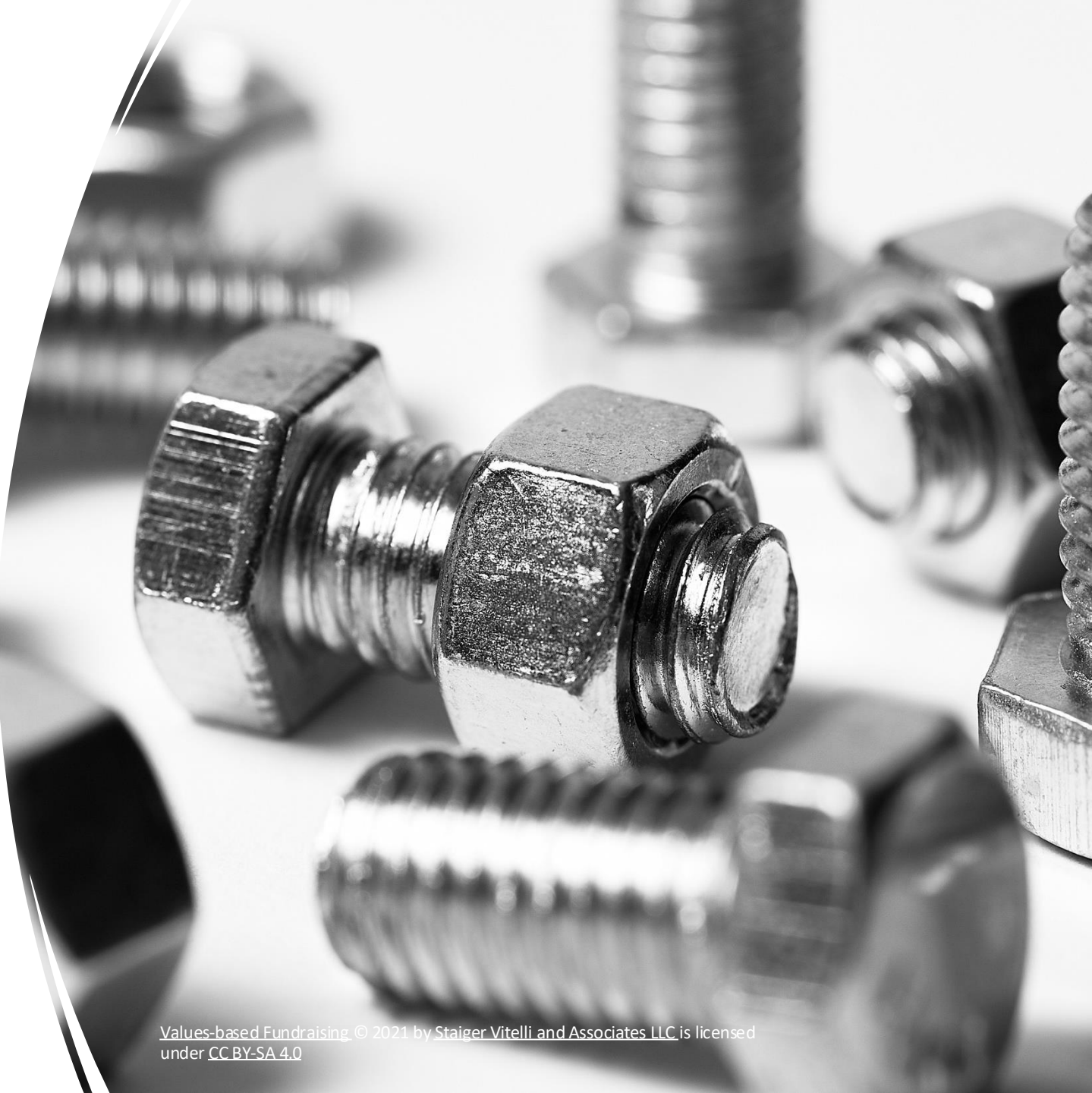
When we think about one-to-one fundraising, we often focus on getting one-to-one meetings or calls with donors and those meetings are important tools for building trust. Personal meetings and calls can be enhanced by connecting them to other organizational activities. Doing so can help keep your interactions with donors mission-focused and can make your work lighter.

Fundraisers typically have at least four types of organizational tools available to them to engage and cultivate donors. These are actions and publications that can help them get answers to their money questions.

1. The nuts and bolts – Organizational communications such as the e-news, annual report, social media, action alerts, and website.
2. Hand tools – Organizational events or activities that are open to all. For example, fundraising events, conferences, performances, exhibits, tours, board meetings.
3. Power tools – The things an organization publishes and produces like a blog, magazine, student and staff publications, videos, recordings, art, and research reports.
4. Specialty tools – Things that come up occasionally that donors can participate in like strategic planning, listening campaigns, and grand openings.

Organizational Communication

- Enews
- Annual report
- Social media
- Action alerts
- Website



Organizational Events

- Fundraising events
- Conferences
- Performances
- Exhibits
- Tours
- Meetings



Organizational Publications and Products

- Blog
- Magazine
- Student and staff publications
- Videos
- Recordings
- Art
- Research reports



Specialty Tools

- Strategic planning
- Listening sessions
- Grand openings





Build Trust

Module 4: Review



Action Learning

- Ask two people money questions
- Complete Cultivation Toolbox Worksheet





Congratulations!

How does it feel to have completed Module 4,
Build Trust?

You're one-step closer to becoming a
Values-Based Major Giving Specialist.