

# Challenging Conversations with Donors



**Values-Based**  
Major Giving Academy

## The Values Pivot Script

After you've gotten to know a little about your donor's values, you're ready for challenging conversations. This is when you notice – and name – when you hear a donor say something that seems to be out of alignment with what they've shared about their values. It's the stuff that feels icky...or worse. And remember, challenging conversations are challenging, not harmful. End the conversation whenever you need to.

Here's a script using the Values Pivot to support you in those moments. Remember that the Values Pivot is a series of actions that don't always play out in this order and that may be repeated. Practice with a buddy in a few different patterns to get comfortable with the actions in The Values Pivot.

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### 1. Express Discomfort

Donor

*Donor makes a challenging comment that doesn't seem to align with your organization's values.*

Fundraiser

*Fundraiser pauses for a moment to process.*

*"I'm surprised to hear you say that. Can you say more so I can understand?"*

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### 2. Back to Values

Fundraiser

*"You mentioned valuing [name a shared value] when we spoke before, and what you're sharing now seems different. Can you share more so I understand what you mean?"*

Donor

*Donor replies and fundraiser still senses values misalignment.*

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### 3. Consent to Continue

Fundraiser

"I'd love to dig into this with you a little so we can learn from each other. I know [area of value misalignment such as racial equity, peace or justice] can be sensitive areas of conversation for me and some others I work with, so I want to make sure it's okay with you to talk about it together. Would that be okay?"

Donor

*Donor confirms that it's okay to keep talking.*

### 4. Get Curious

Fundraiser

"Tell me more about why you feel that way about [restate the misaligned value]." And/or "I didn't know you felt that way. Where do you think that feeling comes from?" And/or "How do you think this would feel to [constituencies served by mission or partners]. How might they respond to what you're saying?"

Donor

*Donor receives and responds to one to three open-ended questions about their own feelings. Fundraiser still senses values misalignment.*

### 5. Avoid Proving them Wrong

SVA

*Note: Trust us, you're going to want to tell them how they're wrong with data or moral arguments. Resist the urge and keep the conversation focused on shared values*

Fundraiser

"You know, at [Organization Name], our value of [shared value such as home, healthy planet, or love] doesn't have an endpoint until [the thing your mission is working to solve for such as homelessness, green-washing, or hate] is a thing of the past. Can you tell me your perspective on this? I'm curious what you think."

Donor

*Donor continues to engage, shares more about what they think, may or may not begin to see and name their misalignment with values.*



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### 6. Offer Vulnerability

Fundraiser

"I've had moments when I felt overwhelmed by the problems our communities face and have felt helpless. I'm constantly working on my own understanding and learning. Do you ever feel that way?"

Donor

*Donor continues engage and may or may not begin to see and name their misalignment with values or the fact that what they said might be "off".*

### 7. Close on the Future

Fundraiser

"Thank you for so openly and honestly sharing your thoughts—and thanks for letting me ask about how you feel about this value of [name value] we share. I'll be looking forward to our next conversation! Can I touch base in [name a timeframe] for a [check-in/meeting/next step for the donor]?"

Thank the donor and end the call/meeting. Sometimes these conversations happen over email, usually with just one or two of The Values Pivot steps happening in each email. When translating this script to email, consider that most humans can really only respond to one question per email. Slow the pace down and ask the questions in the script as the last lines in your note before you sign off.

You've got this! You can bring donors into the complexity of our missions through challenging conversations. If you want more of this kind of training for one-to-one relationships with donors, check out Values-Based Major Giving Academy at <https://www.staigervitelli.com/vbmajorgiving>.

