



Values-Based Major Giving Academy

Module 7: Engage with Gratitude

Action Review

- ☐ Complete Reflection Guide-
your money feelings
- ☐ Practice practicing for an
ask



Values-Based Major Giving

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



Module 7: Engage with Gratitude

Learning Objectives

After this session, you will:



1. Understand how engaging with gratitude helps donors see the impact of giving on the mission and on themselves.
2. Be able to steward donors with two-way dialogues.
3. Be able to transition donors from stewardship to cultivation.
4. Know what to expect as their portfolio matures.



Engage with Gratitude

Module 7: Lesson 1





“ Donor stewardship is the process of thanking your donors for their gift in order to build long-term relationships, keeping them connected to your nonprofit and inspiring them to give again. Stewardship involves managing gifts as your donors intended for them to be used, updating them on the progress and impact of their gifts, and easing them into the cultivation process by keeping them involved with your organization. ”

Source: QGive

Traditional
stewardship is
all about praising
the donor. It let's
the pressure off.



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Engage with Gratitude

Prioritizes connecting donors with opportunities to further their understanding of the complexity, power, and wisdom of the community you serve by engaging in two-way exchanges instead of one-way praise.



“

Community Centric Fundraising is “a fundraising model in which we respect donors and build strong relationships with them, but one that they are not the center of. The community we serve and benefit from must be centered.”

”

[Home - CCF \(communitycentricfundraising.org\)](https://communitycentricfundraising.org)



Engage with Gratitude

- Donors see the difference their gift makes for the community and for themselves.
- Fundraisers and donors share information with each other.
- Move forward quickly – into creating the environment for fundraising, building trust, and agitating with love toward the next gift.



Making stewardship a two-way conversation

Module 7: Lesson 2



The formula for Engaging with Gratitude

- Say thanks.
- Ask a question.

“Thank you for your gift to the coalition. Wow, I see it was your largest gift yet. I’m curious, how did that feel?”





Ask a Feeling Question

Tap into a different part of the human experience

Emotions create connections



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Acknowledgments

- Batch your acknowledgement letters and emails
- Communicate how and when you send them

“We send letters/emails to acknowledge gifts monthly so we can be as efficient as possible and maximize the time and resources that are devoted to mission-work.”
- Ask donors if they want them
- Use language that centers community



Do you need a 2024 cumulative tax receipt?

Thank you for supporting [[community served]] this year!

[[NAME]]

[[address]]

[[City, State, Postal]]

Thank you for supporting [[community served]] in [[location]] in 2024! It is through combined action that we can stop [[problem]] and your giving is a big part of that.

This year, working together, we have:

- [[Accomplishment 1]]
- [[Accomplishment 2]]
- [[Accomplishment 3]]

Please let us know if you would like a cumulative tax receipt of your 2024 gifts for your records.

Please contact our [[title, name]] by emailing [[email]] or calling [[phone]].

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Community Conversation

- Invite your whole community
- Informal virtual gathering
- Share highlights of last year and look ahead to what's coming
- Share a testimonial
- Give everyone a chance to engage



Listening Campaign

- Have staff, board, volunteers call supporters
- Express appreciation
- Ask how it felt to give
- Ask money questions



Moving Forward

Module 7: Lesson 3





Create the Environment for Fundraising



Invite Donors to Share the Gap

“I think you’re planning to attend our event next week to hear about our agenda for the coming year and what it will take to achieve it. Would you invite one or two people who share your values to join you?”



Invite Donors to Share the Gap

“I appreciate that you are having mixed feelings about your gift. That you’re happy to stretch, to go all-in with your support. And that you’re feeling some frustration that your gift is small relative to the need. Can you imagine sharing the need with people you know? Sharing why you support our organization and that it takes \$1 million a year to fulfill our mission?”



Build Trust

**We're
already
looking
ahead to the
next gift?**

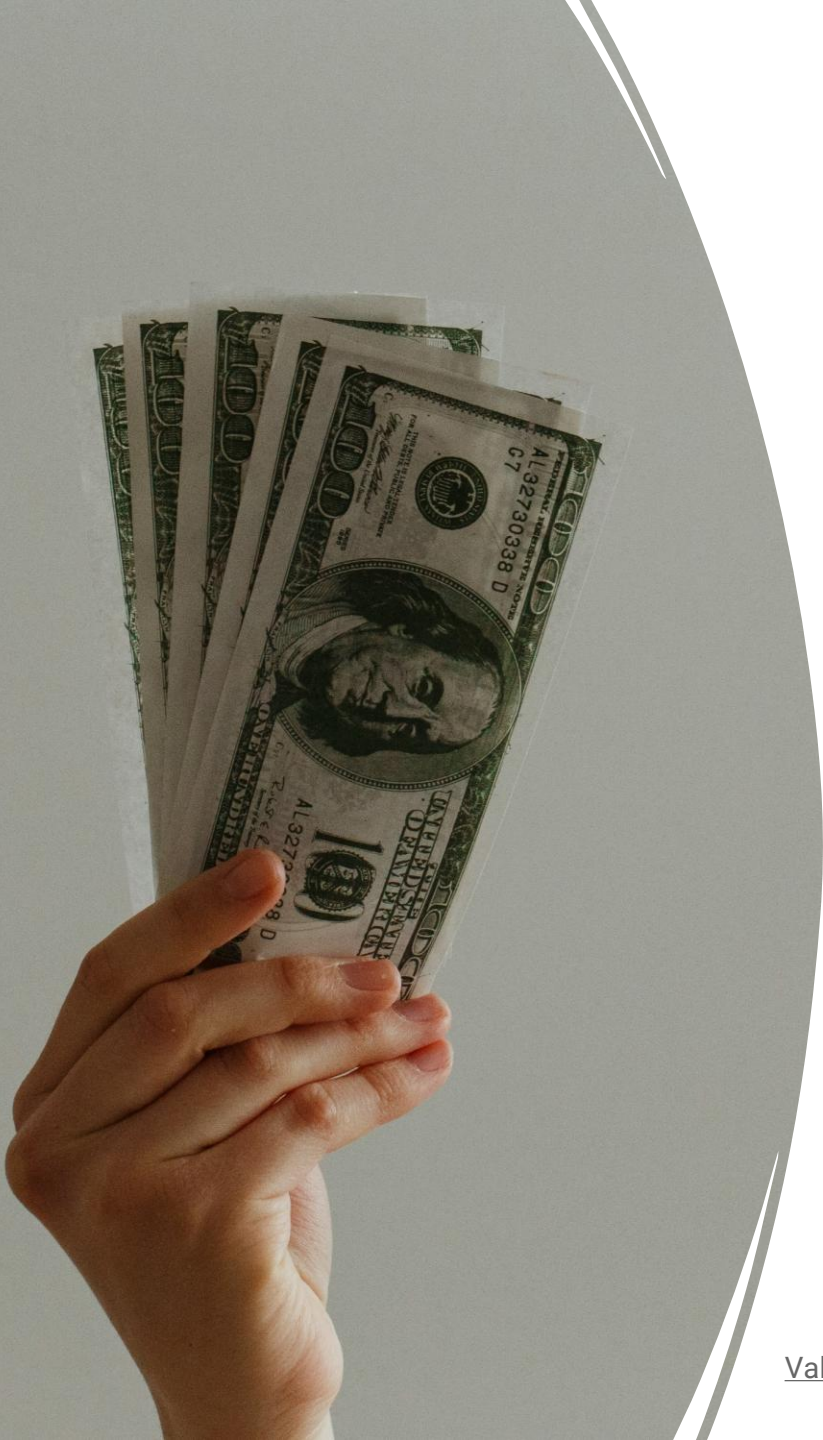


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What do you need to know from the donor before you can ask for the next gift?



Questions About Money

- Where did your / your family's money come from?
- How do you feel about having so many resources when our service users struggle because they have so few resources?
- How do you think about where money comes from? Such as money that was created from natural resource extraction or enslaved labor or land theft from indigenous peoples.



Agitate with Love



The Values Pivot

Express Discomfort

Back to Values

Consent to Continue

Get Curious

Avoid Proving them Wrong

Offer Vulnerability

Close on the Future

Boundaries

Get clear about:

- Your role with donors
- Your goal for engaging with donors
- What it takes for you to stay whole





The Mature Portfolio

Module 7: Lesson 4





Portfolios Change



Many donors will require
less of your attention.



Segment Your Portfolio

1. Donors for whom your goal is to significantly increase giving
2. Donors for whom your goal is to increase giving
3. Donors making their most meaningful gift

Grow Your Portfolio

- Qualify a few new donors at a time.
- Ensure you have a plan for each donor in your portfolio.
- Make sure you're able to sustain your portfolio during busiest times.



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Are you being BOLD enough?

Do you have donors in each
of the segments in your
portfolio?

Ease & Joy



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Engage with Gratitude

Module 7: Review

VBMG Academy Reflection

Friday, April 18
11a.m. -12 p.m. Central





VBMG Coaching Guided Assessment and Development Plan Customized Consulting Packages

Action Learning

- ☐ Come to the VBMG Academy Reflection
- ☐ Schedule your 15-minute check-out





Congratulations!

How does it feel to have completed
Values-Based Major Giving Academy?

You're a Values-Based Major Giving
Specialist!