

Case Study



Values-Based Major Giving Academy

Values-Based Major Giving: Lifecycle of a Donor

Meet Ben. He's a Values-Based Fundraiser – based loosely on values-based fundraisers we've known.

Ben is the fundraiser for Cypress Neighbors – a fictional organization dedicated to improving the lives of people in the Cypress Neighborhood of a mid-size city. They provide some services, including a food shelf and activities for neighborhood kids. And they engage neighborhood residents to advocate for things that are important to them. The organization's values are community, activism, and equity, which align well with Ben's own values.

It takes about \$500,000 a year in community contributions to fuel Cypress Neighbors. Ben raises about half of this from individual donors. Last year, about 750 people made financial contributions.

Ben is interested in expanding the portfolio of donors that he connects with one-to-one. His goal is to increase the size of their gifts and engage them more actively in Cypress Neighbors' work.

Because Cypress recently cut back on the number of events they have each year (did you catch that – they stopped doing some things), he now has about a day a week for one-to-one fundraising. He knows he can have about 24 people in his portfolio. He's already got 12, so he's looking for 12 more.

Ben understands the building blocks of Values-Based Major Giving. He's been practicing for a little while. Here's how he puts them in action.

He knows just where to look to find major donors – in his donor file. Major donors are already giving to his organization. So, he has them identified.

Ben needs to choose which of the donors in his donor file are good candidates for his one-to-one fundraising portfolio. He needs to qualify 12 more donors for one-to-one fundraising. He and his colleagues have established pre-qualification criteria for one-to-one fundraising based on their values of community, activism, and equity. Ben queries his database to find people who:

1. Have given at least \$500 in the last two years, and
2. Have taken another action with the organization by attending a community event, responding to an action alert, and/or volunteering, and
3. Live in the neighborhood

He gets a list of about 50 people. People who are good candidates for his portfolio because they fit the organization's values-aligned qualification criteria. These folks are pre-qualified. Now, Ben needs to find out which of them are interested in a one-to-one fundraising relationship with someone in his organization.

Sharon is on the list. She is in her late 40s. She has a career and a couple young adult children. She's lived in Cypress Neighborhood for nearly 20 years.

She came with a neighbor to the mission-centered fundraising event Cypress Neighbors held about nine months ago and made a gift, her first, of \$500. Since then, she's been getting Cypress Neighbor's emails and once contacted her city council person about improvements to a park in the neighborhood that Cypress Neighbors has been advocating for.

Ben wonders if Sharon is interested in a one-to-one fundraising relationship with him. He begins the qualification process. Ben sends Sharon an email. He introduces himself, thanks Sharon for her gift and for



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contacting her council person, and asks if she'd be willing to share why the park improvements are important to her. He invites her to respond in an email or to meet him at the local coffee shop sometime.

A few days pass. Crickets. Nothing from Sharon.

So, Ben picks up the phone. He calls Sharon and leaves a voicemail similar to his email.

Two days later, Sharon shows up in Ben's in-box. She shares that she's lived in the neighborhood a long time, has seen it change over the years, and really wants to see more investment in the parks.

Nice. Sharon is qualified. She responded to Ben. They're in a one-to-one conversation about the organization's work.

Now Cultivation begins. It's time to build trust.

Ben thanks Sharon for her response. He comments on the organization's current work on the park issue and tells her he'll keep in touch as the work evolves.

A few weeks later, the organization is gathering neighbors to show up for a City Council meeting where the park improvements will be discussed. Ben forwards the action alert to Sharon with a personal note – "I know you care about this issue. Will I see you there?"

Sharon responds that she's planning on it.

After the Council Meeting, Ben introduces himself to Sharon and asks her what she thought of the meeting. Sharon has lots of questions about the process and politics. They talk a little then Ben asks if she'd like to meet the following week to talk more. Sharon agrees.

Ben and Sharon connect a couple more times over the next few months – they have their coffee, exchange emails, and chat at a community picnic. Each time, Ben has a goal to learn more about Sharon's values, how she decides to make financial contributions, and where Cypress Neighbors fits in her giving. He has a sense of which money question he's going to ask her each time they connect. And he records what he learns in Cypress Neighbors database.

He also helps Sharon learn about the organization and issues. He shares Cypress' gap message – "It takes \$500,000 a year to fuel our mission."

Within a few months, Ben knows that Sharon really cares about the parks and about making sure other kids in the neighborhood have safe places to play and enrichment opportunities like her own kids did growing up in the neighborhood. She has shared that she consults with her husband and children before making decisions about financial contributions. Her giving comes from her income and she makes most of her gifts in the spring after bonuses are awarded at work. Ben also learns that the Cypress Neighbors is one of her top three causes.

Ben feels like he knows what he needs to know to ask Sharon for a gift. One Thursday morning, Ben sends Sharon this email with his pre-ask. He writes,

"Sharon, Over the last few months I've heard how much you care about Cypress Neighborhood and the people who live here. As I've shared, it takes about \$500,000 a year from the community to support our services and work. I'm wondering if it would be all right to meet in the next couple of weeks so I can ask you to consider making another gift to Cypress Neighbors."



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In this pre-ask, Ben is getting Sharon's consent to be asked for a gift.

Sharon agrees to meet and in doing so, she gives her consent to be asked for a gift.

Ben and Sharon sit down at the coffee shop, catch up on each other's work. Then, Ben says: *"Sharon, would you consider committing to making a gift of \$1,000 a year for the next five years?"*

And he waits for her response.

Sharon sits quietly for a minute. She says that's a big commitment for her. She'll need to think about it and talk with her family.

Ben thanks her for considering it and asks when a good time to follow-up with her would be. They agree on a time and wrap up their conversation.

Three weeks later, Ben sends an email to check-in. Sharon responds that she'll make a five-year commitment of \$750 each year. This amount fits better with her commitments to support other things she cares about. The first year's gift is in the mail.

Ben records Sharon's pledge and first gift and thanks Sharon. He asks her how she'd like to be engaged in the coming year, now that they've won the park improvements they were working on.

This is engaging with gratitude or stewardship – the ways in which Ben helps Sharon stay connected to and engaged in the work.

Sharon indicates she's interested in staying active with Cypress Neighbors. She appreciated being able to learn about the City policy process.

A couple weeks later, one of Ben's colleagues mentions she's putting together a committee for another neighborhood issue. Ben suggests she talk with Sharon.

Ben's colleague and Sharon connect and Sharon joins the committee. Ben connects with her occasionally when she's in the office and around the neighborhood, often asking more money questions.

A couple months before Sharon's next planned pledge payment, Ben sends her a short friendly email asking for her pledged gift.

Sharon is in. She's an active part of Cypress Neighbors – part of the community. Her stewardship is happening in every interaction she has with Ben, the organizer, other volunteers, and her neighbors. She sees the impact every day. She trusts that her gifts are being used wisely.

Ben checks in occasionally. He seeks out opportunities to ask more money questions and learn more about Sharon. He asks for her annual gifts and acknowledges her giving – of time and money and leadership.

That's how Values-Based Major Giving is done.