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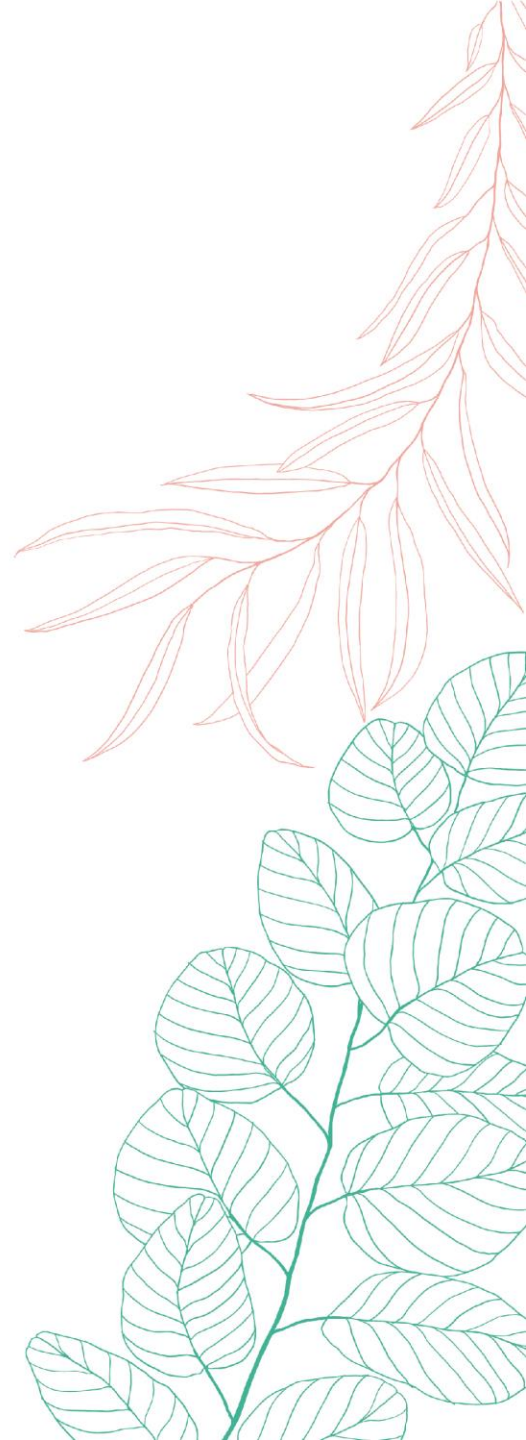
How to Have Challenging Conversations with Donors and Stay Whole



What are you proud of?

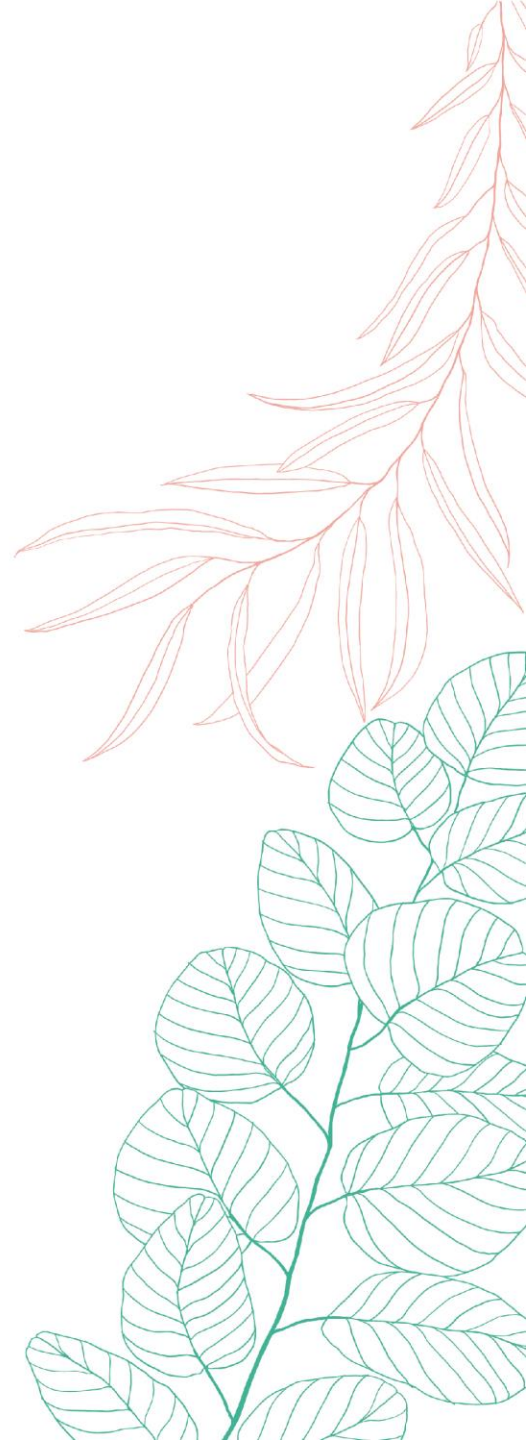
Learning Objectives

1. Define loving agitation
2. Use a values-pivot in challenging conversations with donors
3. Strengthen your capacity for challenging conversations



Session Plan

1. What is a challenging conversation and why do they matter?
2. Introduce Loving Agitation
3. Share the Values Pivot
4. Practice the Values Pivot
5. Action items
6. Share free resources
7. Wrap up





Challenging Conversations

When you notice a donor's words or actions are out of alignment with their own and/or your organization's values.

It's your choice.

- Role and goal
- Trust
- Boundaries
- No harm



You can choose to walk away.



Framework for Boundaries

VALUES-BASED MAJOR GIVING ACADEMY

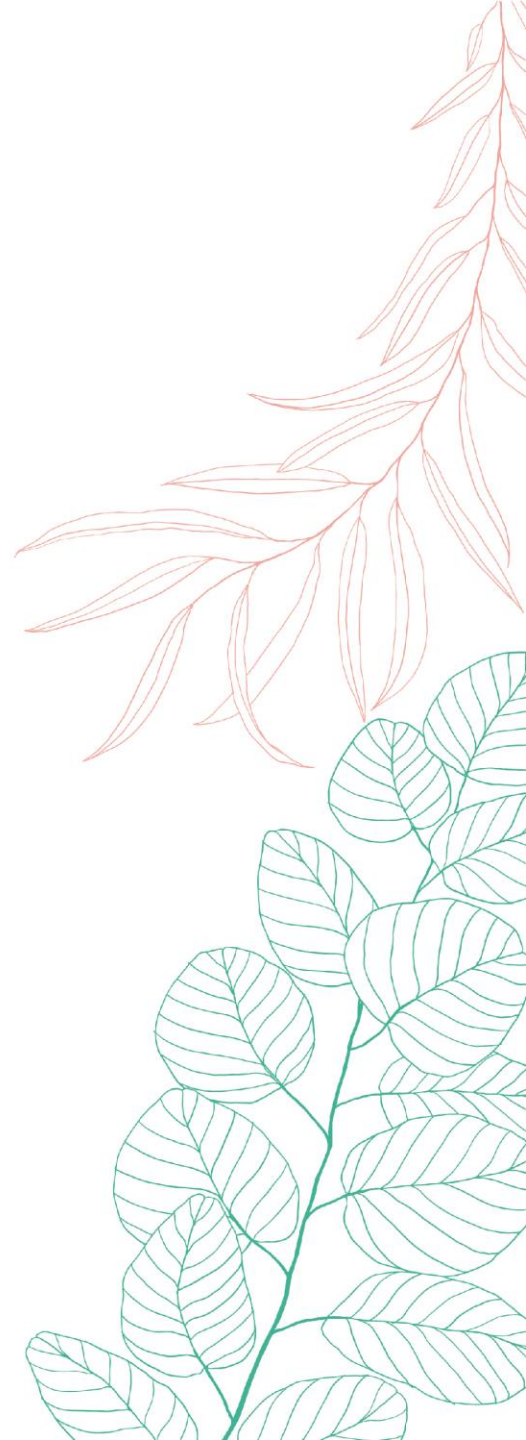
What's your role with donors? How will you know you're staying within your role?

Reflect on times when have you may have ventured outside your role? What did you notice?



What signs can you spot to tell you you're outside your role?

Loving Agitation



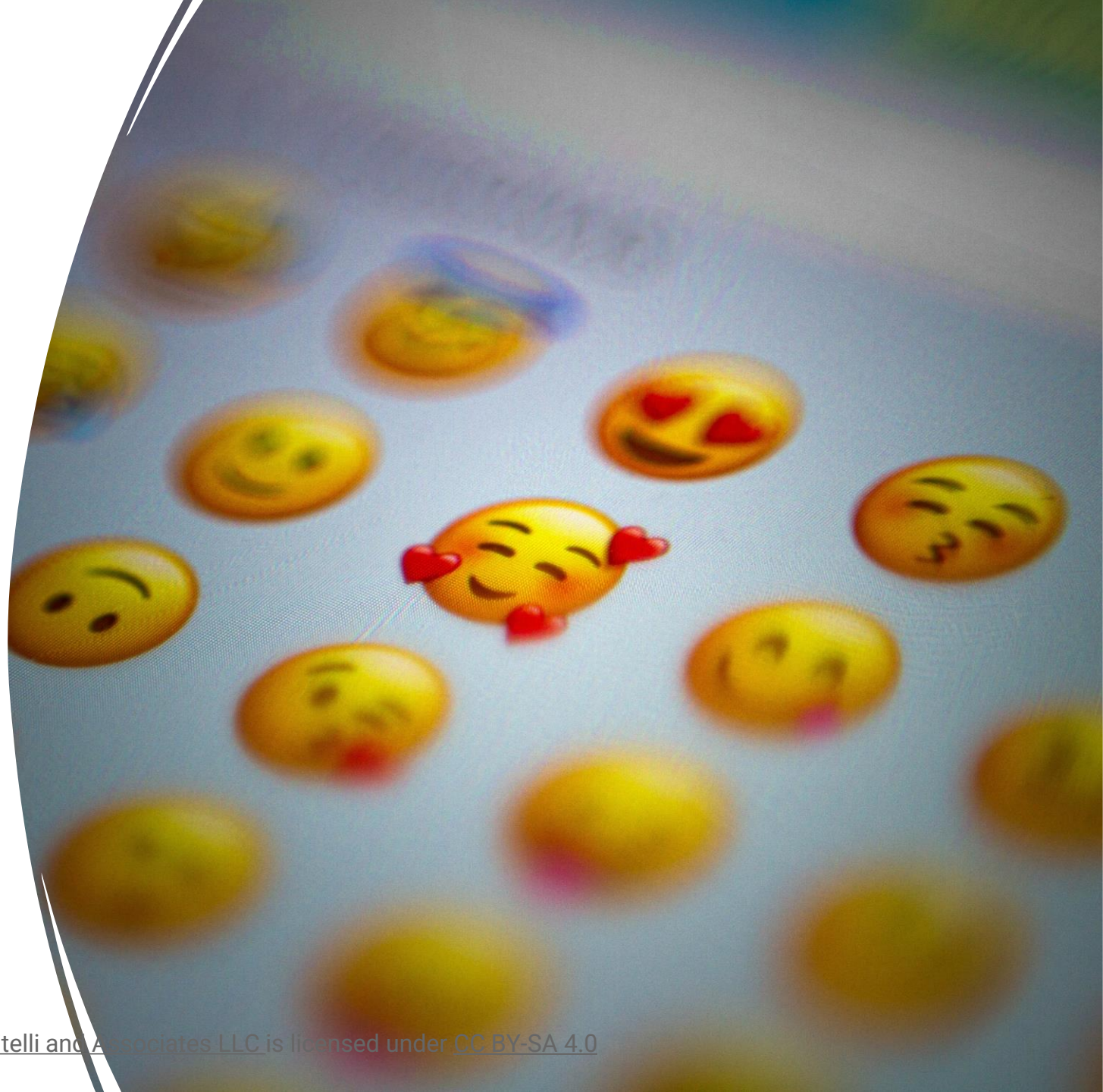


We treat donors as partners, and this means that we are transparent, and occasionally have difficult conversations.



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

How does principle 6 make you feel?





Loving Agitation

Loving agitation is a query with a donor about how their stated values align with their actions.

Donors want to grow.



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Values

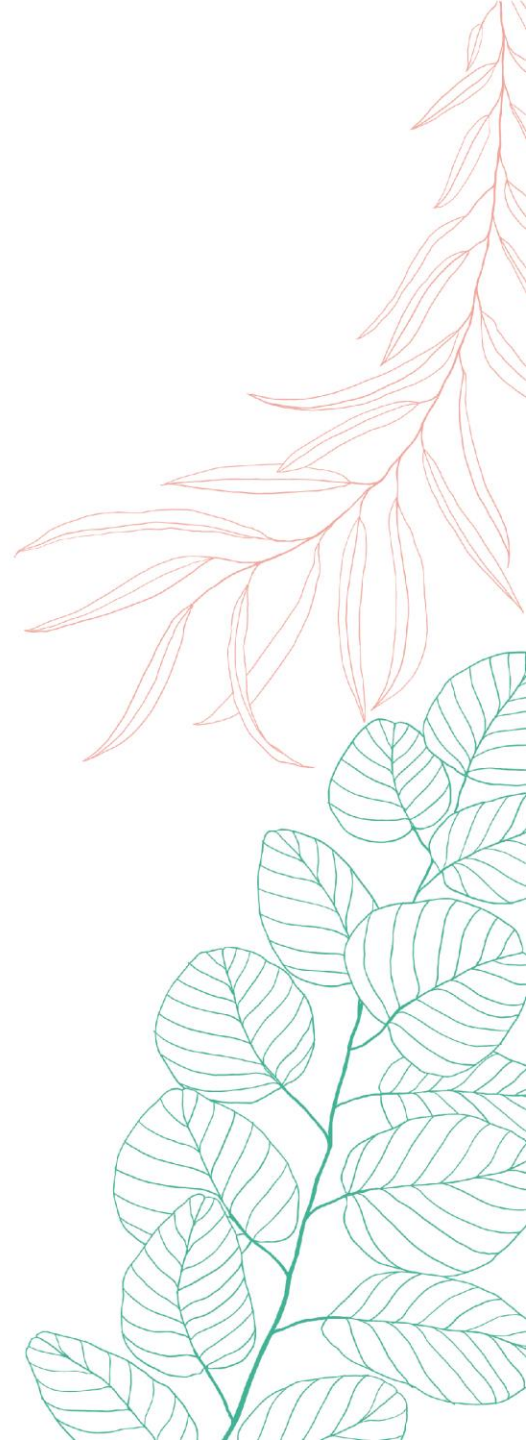
- Know and share your organizational values with your donors
- Ask your donors about their values



Loving Agitation

Notice and name when you hear something that is out of alignment with what a donor has shared about their values.

The Values Pivot





The Values Pivot

Keep the conversation
focused on shared values



The Values Pivot

Express Discomfort

Back to Values

Consent to Continue

Get Curious

Avoid Proving them Wrong

Offer Vulnerability

Close on the Future

Express Discomfort

Verbally or non-verbally

"Hmmm. Well, thanks for sharing that."



Back to Values

Address the
misalignment

"You mentioned valuing equity when we spoke before, and what you're sharing now seems different."



Consent to Continue

Get donor's agreement

"Would you be ok if I asked you some more questions about this?"



Get Curious

Encourage the donor to share their feelings

"Can you tell me your perspective on this?"



Avoid Proving them Wrong

Taking the conversation into facts moves you further away from values

“Our value of equity doesn’t end until racial disparities in education are a thing of the past.”



Offer Vulnerability

Share a personal
experience

"...do you ever feel that way?"



Close on the Future

What's your next step?

"I appreciate our open dialogue. I'll be looking forward to our next conversation! Can I touch base in June for a check in?"





The Values Pivot is about fostering understanding, encouraging reflection, and moving the donor a bit closer to understanding the complexity of the work of your organization.



Practice the Pivot

Form a group of 3. Introduce yourselves.

Take turns consulting with each other.

1. Share something challenging a donor has said. (1 minute)
2. Workshop together how you might have used the values pivot to respond. (4 minutes)
3. Repeat with the next two members of your group.



Next Steps

- Use Boundaries Framework worksheet to reflect on your boundaries
- Practice the Values Pivot with your colleagues
- Check out free resources





Free Resources

- Webinar: Intro to Values-Based Major Giving
www.staigervitelli.com/intro
- Free 15-minute Q&A
www.staigervitelli.com/schedule-a-call
- Sign-up for our Community of Care emails
[Enews Sign Up Staiger | Vitelli \(staigervitelli.com\)](http://Enews%20Sign%20Up%20Staiger%20%7C%20Vitelli.staigervitelli.com)
- CCF Hub - [Community-Centric Fundraising's Content Hub \(communitycentricfundraising.org\)](http://Community-Centric Fundraising's Content Hub)

What's one
thing you
will do
differently?



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Congratulations!

You can have challenging conversations with donors and stay whole.