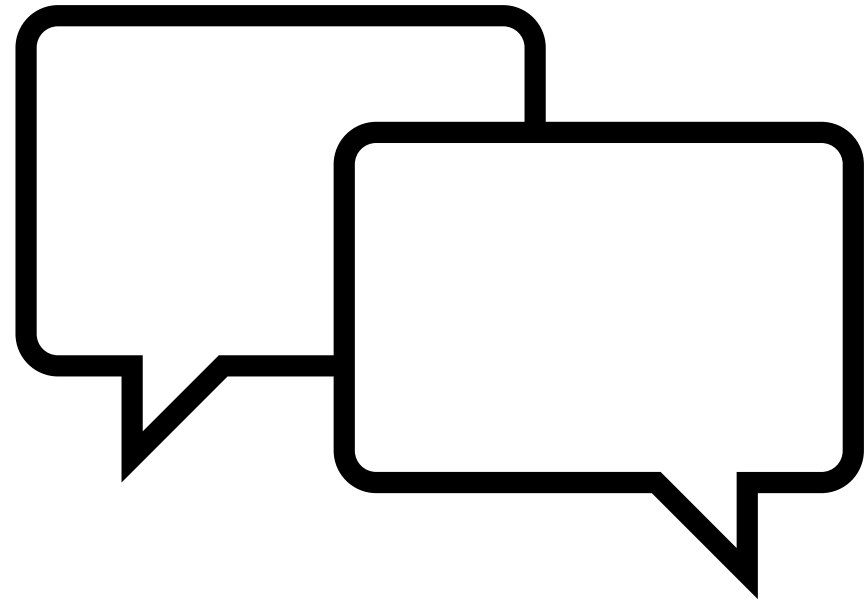


Values-Based Donor Qualification

April 11, 2023

Name,
pronouns,
organization,
role, where you
are, &
your biggest
donor
challenge



Session Outcomes



1. Explain why a donor qualification plan is important to focusing your fundraising and moving more money to mission



2. Determine how your organization's values guide the type of donor qualification plan you choose



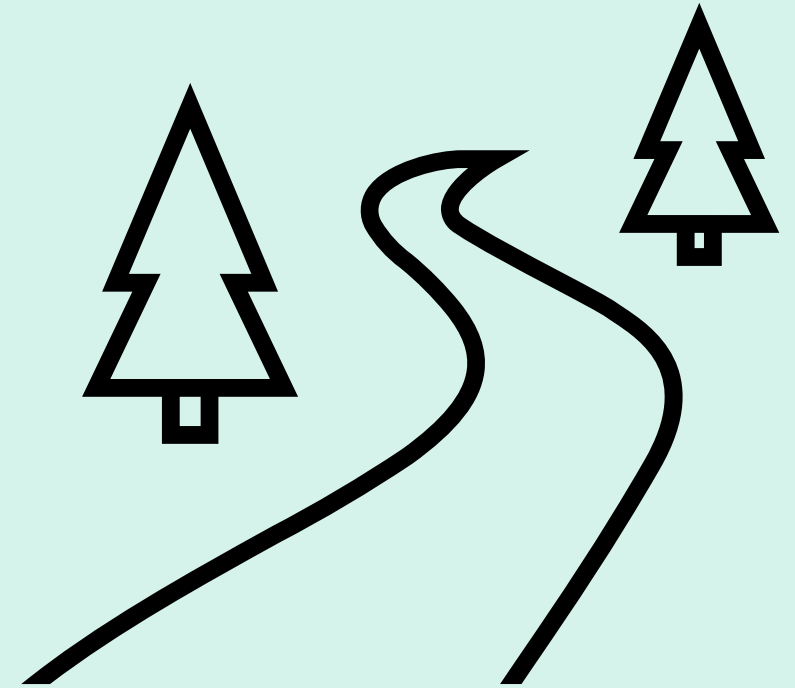
3. Understand more about community-centric fundraising and how values-based methods can be an on-ramp to practices rooted in equity



4. Take action on values-based donor qualification tools that work for your organization

Agenda

1. Welcome and introductions
2. Redefining major giving 101
3. Values-based Qualification
4. Your questions, challenges & opportunities
5. Wrap up and next steps





One-to-One Fundraising





Relationships

“...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.” www.communitycentricfundraising.org

Why do Donor Qualification?

1. Can't assume that all people want a 1:1 relationship.
2. Most organizations can't engage every donor in a 1:1 relationship with the time they have today. To filter the donors that make the most sense for your organization, you must have criteria that helps you decide which donors to engage.

What is Donor Qualification?

Definition: a process to determine who in the “pool” of potential major donors actually wants a relationship with you. www.Veritusgroup.com

Plan for 1 in 3 people being **open** to that 1:1 relationship. www.Veritusgroup.com

Openness is defined as a positive-neutral response to your outreach. Sample outreach questions:

-What inspired you to give?

-I'm new. Can we meet so you can help me get to know the organization?

-I'd love your advice on our next appeal/e-news/event. Will you give me your perspective as a supporter?

What's different about VBDQ?

- Traditional fundraising practices encourage criteria on the amount of money a donor gives. This creates a donor “pool” with a lack of diversity in type and size of gifts with harmful ripples for internal fundraising practices and in the community you stand with.
- VBDQ values money as a powerful tool to create change and encourages organizations to practice valuing other resources that are crucial to your work.
- Values-based fundraising practices strengthen an organization's base of support to raise money and create changes. It also can build powerful relationships with and within communities you stand with.

Defining Your Donor Pool for Qualification

Sample 1

- Money
Quantified: \$1k in 24 months
- Service
Quantified: Volunteer in last year

Sample 2

- Money
Quantified: \$500 in 24 months
- Advocacy
Quantified: More than one Advocacy action

Sample 3

- Money
Quantified: any size gift made in the last 5 years
- Solidarity
Quantified: Has brought others to programs



VBDQ Key Step:

Define your donor pool.

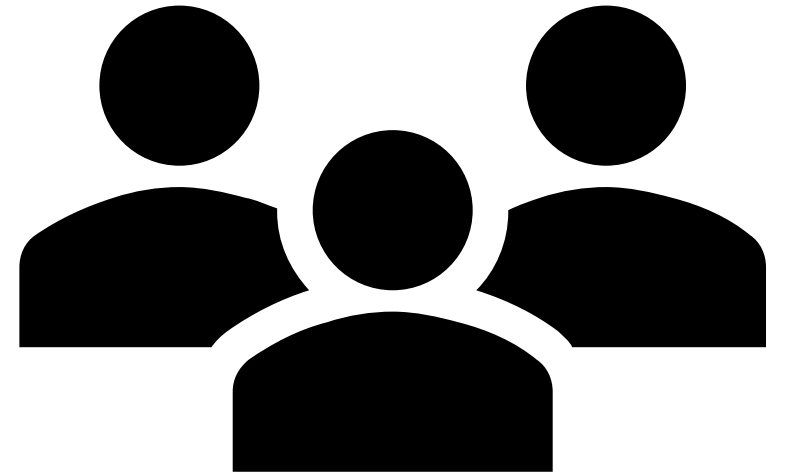
Ask-

1. Will you value something else along with money? What will it be?

2. How will you quantify money and ____?

How many donors can I manage?

Every hour you have in a week
represents 3 one-to-one donors.

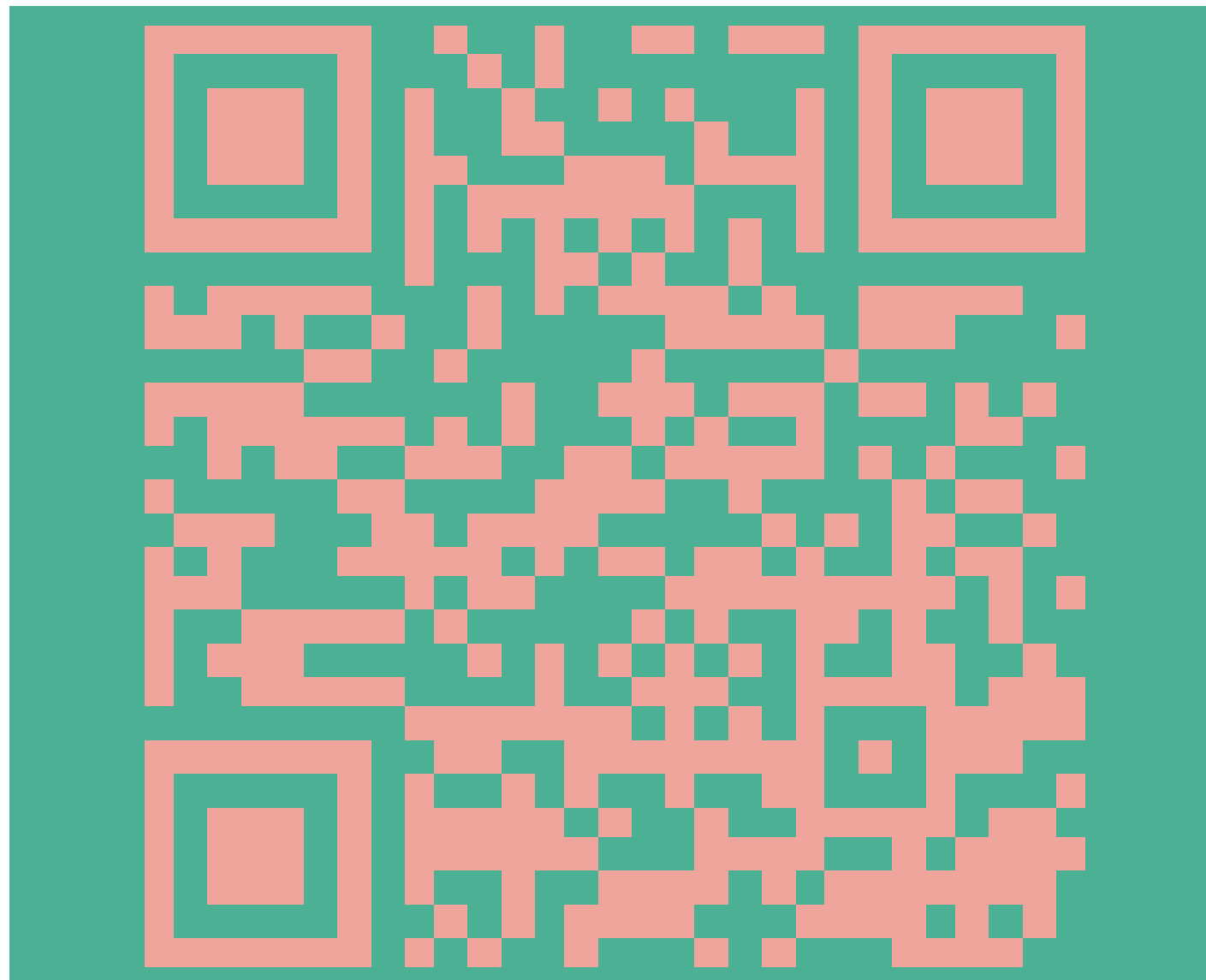




**Putting
qualification into
action**

Your Questions





**Steal this
Script!**

Related Resources

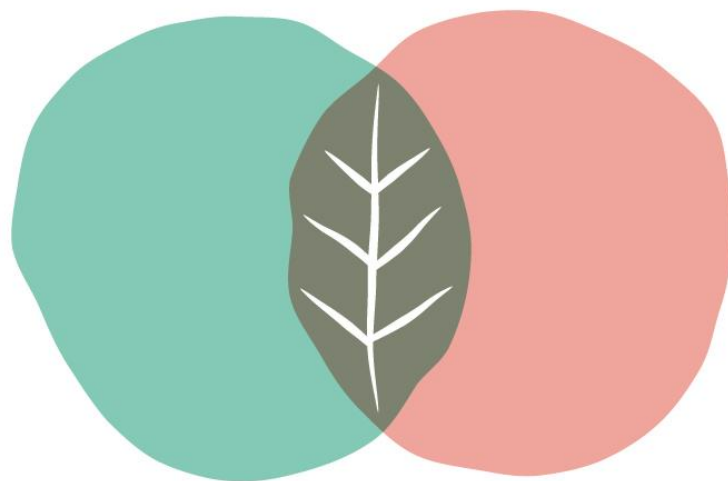
✓ Our friends, later today:

- ✓ Round II Breakout, **Grow Your Own: Elevating BIPOC Staff via Grant writing**, Tiffany Dykes
- ✓ Round III Breakout, **Lessons Learned from Practicing Community-Centric Fundraising**, Mallory Mitchell, Clara Jung, Aaron Zimmerman, Sarah Staiger

✓ Related learning:

- Mallory Mitchell's newsletter: www.mallorymmitchell.com
- Further Together (Maria Rio) newsletter: <https://www.gofurthertogether.ca/>

The conference is at #NPFundraising23 on social



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