

True Case Scenario 1: *A Donor with Dementia*

You are CDO of a large healthcare organization. Alice is a faithful donor, but not a woman of means. She annually gives \$2500 and has indicated that she has included your organization in her will. She is a widow and is grateful for the care your organization provided to her husband. At a fundraising event, Alice shares the sad news that she is in the early stages of dementia. She asks for you to keep it to yourself, since she expects to be okay for a few years.

Six months pass. One Monday morning, a check for \$10,000 arrives from Alice. Delighted, you call her to thank her. She talks about her gratitude but says little else. The following morning, a check for \$10,000 arrives from Alice. You call her again to see if it was a mistake. She says that it wasn't and that you should deposit both checks. Of course, you thank Alice again and occasionally call to schedule a meeting, but she declines.

Three months pass. One Monday morning, a check for \$15,000 arrives from Alice. Again you call, and again she says it is intentional. The following day, another \$15,000 check arrives. Again, she declines a meeting and says everything is okay.

- What are the facts?
- What information do you need? How do you get it without violating Alice's privacy?
- What concerns do you have? For the donor? For your organization?
- What are all possible solutions?
- What are the merits/concerns of each solution?
- What action will you take?
- What are the possible consequences of the action?

True Case Scenario # 2: A Funder with An Unusual Request

A local philanthropist has been generous in the community for 20 years. In addition to founding a very successful business, he and his wife started a philanthropic foundation that has given millions of dollars away to many area nonprofits.

As he neared retirement, the philanthropist wrote and self-published a book. The autobiography is entitled *Rags to Riches*.

Shortly before the annual funding cycle for the foundation opened, foundation staff emailed all prior recipients, including those that had not received funding for a decade or more. The foundation staff asked recipients to help promote the book (on the nonprofits' websites and social media, in emails, and by purchasing and distributing the book to stakeholders. Foundation staff members were assertive in their outreach, and, while many nonprofits complied, they felt pressured to help sell the book.

Is this an ethical dilemma for the foundation? For a nonprofit?

Break into small groups, discuss, and present your findings in 10 minutes.