

ASKING STRATEGIC QUESTIONS.org[®]

People remember more of what they say, than what you say. People believe what they say, more than what you say. People enjoy conversations in which they speak the most and they remember how you made them feel.

Therefore, it is your responsibility to demonstrate your interest in their thoughts, opinions, beliefs, expertise, and life experiences. You must elicit the case for support from your potential donors! You want them to tell YOU whatever you want them to REMEMBER. Listening for understanding is an essential component of the conversation.

Following is a list of sample questions to help you do just that. Examples are in parenthesis. Fill in the blank for your organization, the issues you are tackling or problems you are solving and the impact you are trying to achieve.

You can weave the questions into a variety of purposeful conversations or use in an interview. Structured for positive responses and for gaining specific information that will help you in your leadership, major gift, and gift planning work, each question has a different purpose. Together, they will help you probe for information, advance the relationship, answer all the "Rights," and receive a joyful "yes," to your request for increased engagement with your organization, a significant gift to one of your priorities and remembering your organization in their estate plans.

About Your Organization

1. What do you believe is the role of (education, healthcare, advocacy, the arts, environmental initiatives,) in our (community, state, country, globally)?
2. What are some of the issues around (education, public health, disabilities, diverse work force) that inspires or troubles you? Can you say more about that?
3. In what positive ways has our organization touched (influenced, changed) your life (your community, your world view, your family)?
4. How do you feel about our mission, vision and work?
5. We so appreciate the philanthropic (and volunteer) investments you've made into our mission, vision and work. How did that come about? What inspires you to continue to support us? (We've missed your support these last few years. May I ask, what changed for you?)
6. What do you believe are the perceptions of our organization (internationally, nationally, in the community, region, state)?
7. What are your perceptions of our effectiveness?
8. Which aspects of our programs do you believe are our greatest strengths?
9. In what ways do you feel good about the gifts you make to us?
10. To what degree do you believe your gifts to us (your investments in our programs) are making a difference?
11. To what degree do you feel we use your contributions wisely, that we manage our revenue with thought and care?
12. Which organizations do you perceive are our chief philanthropic peers?
13. What are your impressions of our publications (social media, website, communications, YouTube channel, Facebook page)? Which ones do you (receive, read, view, listen to, like)?
14. How well do we tell our story? How well do we make a case for philanthropic investment? To what degree did you find (the communication vehicle) engaging? How so?
15. Do you feel more informed about our mission, vision and work as a result of reading our publications (visiting our website, viewing our Facebook page, following us on Twitter)? More informed about how your gifts are used? More informed about our priorities and plans for moving forward? More informed about how you could become involved?

16. Have you attended any of our events? Which ones? (Thank you attending our (event name). How did that come about? What was your impression?
17. Do you have any concerns you would like me to share with our CEO, volunteer chairs, Board?
18. How well do you feel you know our CEO? To what degree do you trust his/her leadership?
19. What are your impressions of our senior administration? Can you say more about that?
20. Have you had an opportunity to (read, hear) our (vision for the future), (our strategic plan), (our bold ideas for future), (the benefits we see in this project)? What are your impressions?
21. Have you had an opportunity to meet with any of the people we serve? Under what circumstances? What were your impressions?

Additional Gift Planning Questions for Current Donors

1. We so appreciate you including us in your estate plans. What aspects of our program inspired that decision?
2. As you think about the future of the (people we serve, our planet, the arts, our children, education in America) what are some of your worries; what are your hopes? What role do you see our organization (institution) playing in addressing those concerns (aspiration) going forward?

Additional Pandemic Questions

1. We are concerned and wanted to check in. How are you?
2. How is/are your family (your business partners) (your workers) coping?
3. This crisis reminds me how grateful we are for all those who invest in us with their time, ideas, wisdom, and treasure. I wanted to reach out today, to say thank you again for all you do. How are you managing?
4. What worries you the most?
5. How are you addressing those issues? What's working for you?
6. Is there any way we can be of assistance?

Mission, Vision, Work and/or Project

1. What are your impressions of (our vision for the future) (our strategic plan) (our bold ideas) (our aspirations for the people we serve) (our aspirations for our environment) (our hopes for...)?
2. In what ways do you find our case for philanthropic investment strong and compelling?
3. To what extent do you believe (the mission we have, issues we're solving) are serious problems for our (community, state, region, country, world)?
4. In what ways do these (did these) issues impact you, your family, your neighbors, your beliefs, your values?
5. As you (read, heard) our vision for the future, in what ways do you see our organization effectively addressing these issues?
6. In what ways might you help us address these issues?
7. As you consider the people and institutions who (that) support us, how might we position our (vision) (plan) (ideas) so they would see the importance of their roles as stakeholders?
8. What impact do you believe achieving our vision will have on (the people we serve, our community, our state, the nation, global society)?
9. What do you believe our (staff) (program staff) (Board) (closest friends) should do to help make this vision (these ideas) (this plan) a reality?
10. Several people I know were particularly struck by the conversation generated from various news stories about what it means to be generous. How do you decide what it means to be generous? How do you discuss generosity with your spouse, children, grandchildren?
11. Are there any questions about our vision, mission, work, priorities that we've not answered?

Additional Gift Planning Questions

1. Many of our donors, especially those who have been with us over the years, would like their children and grandchildren to be part of our philanthropic family. To what extent is that important to you?
2. How do you involve your children (grandchildren) in your philanthropic interests?
3. How might we help you engage your children (grandchildren) in our mission, vision, and work?
4. Are there others with whom we should meet, perhaps a financial planner or other members of your family who help you with your charitable giving? Who might they be? How might we do that?

His or Hers Network

1. To what degree do you use social networking like Facebook to connect with colleagues and friends (keep up with family, children, grandchildren)?
2. How else do you stay connected?
3. Which social networking sites do you find the most useful, enjoyable?
4. How might we use social networking to connect with (fill in the group)?
5. What is the best way to connect with you?

Capacity to Give, Personal and Lifestyle

1. To what extent do you get to see your children? Grandchildren? Family members?
2. Have you had a chance to take some time off this year? If so, where did you go? If not, what would you like to do?
3. Do you enjoy entertaining in your home? Tell me about that.
4. How's business? How is this economy affecting you? Your business?
5. How does the economy (your business situation) affect your philanthropic decisions? Your estate plans?
6. What a beautiful piece of artwork (or other observed collection), do you enjoy collecting? How did that come about? Clearly, you care deeply about (fill in). Have you made provisions for their distribution in your estate plans? How so?
7. In what ways do your personal interests impact your volunteer activities, philanthropic investments?
8. Many people of means believe they should ensure their heirs' future; others believe children should make their own way, where do you stand on this issue?
9. Do you serve on any boards? Which ones? Every organization it seems is involved in major fundraising campaigns; is that true for (the name of the organization for which he or she serves as a board member)? How are you involved? How big is the campaign?

Additional Planned Giving Questions

1. May I ask, what roles do your children (grandchildren) (financial planner) (lawyer) play in your philanthropic decision making?
2. What issues do you weigh (did you weigh) when you are making decisions about your estate plans?

Additional Pandemic Questions

1. We are concerned and wanted to check in. How are you?
2. How is/are your family (your business partners) (your workers) coping?
3. This crisis reminds me how grateful we are for all those who invest in us with their time, ideas, wisdom, and treasure. I wanted to reach out today, to say thank you again for all you do. How are you managing?
4. What worries you the most?
5. How are you addressing those issues? What's working for you?
6. Is there any way we can be of assistance?

World View, Philanthropy and Giving Interests

1. What do you hope to accomplish with your philanthropy? Is that true for your spouse as well? What are her/his philanthropic goals?
2. What role does passion for a cause, project, or outcome play in your philanthropic decision-making?
3. How do you uncover that passion? How have organizations and institutions you care most about succeeded in tapping into your passion?
4. If money were not a consideration, what would you like to accomplish with your philanthropic investments?
5. What other organizations do you currently support? Volunteer for? Serve on the board of? What does your spouse support?
6. To what degree do you include your children in your philanthropic decision-making?
7. How have you taught philanthropy (generosity) to your children (grandchildren)?
8. Which organizations are your top three and why? Is that true for your spouse as well? Which are his/her top three?
9. Where does our organization fit on your (your family's) list (if not among the top three)?
10. What are your expectations of the organizations in which you invest? Is that true for your spouse (your children)?
11. As you think about the enterprise of (the primary business you are in) in this country (in the world), what do you think is its greatest contribution? To what degree do you believe that contribution is essential? Do you see our organization contributing in those ways? To what degree does your spouse feel similarly?
12. What values underpin your philanthropic decision-making? To what degree do you share values with our organization?
13. When you give, do you give both annually and to capital projects? To what degree is that true for your spouse?
14. As you think back on all the philanthropic investments you and your family have made over the years, which gave you the most joy? (Which were most aligned with your values) (Which were most aligned with your personal passions)?
15. What capital gifts have you given that have given you pleasure? Made an impact?
 - How did it come about? What was the impact? What made it so pleasurable? Are you still involved with them?
16. As you think about your philanthropy, are you most interested in saving and changing a life, improving the community, or having a wider societal or global impact? Can you say more about that?
17. Have you ever made a gift using a planned giving vehicle like a trust or annuity? (Has your spouse)?
 - How did that come about? Is that something that interests you? Do you feel knowledgeable about such vehicles? Would you like to know more?
18. Under what circumstances would you be willing to make a stretch, capital (endowment) gift to a charity? To (name)? (What role would your spouse, your children, a financial advisor) play in that decision? *
19. Among our fund-raising priorities, which do you find the most compelling? Why? Least compelling? Why?
20. What factors go into your philanthropic decisions?
21. In our household my spouse and I make all of our giving decisions together, how does it work in your household?
22. Is (name) part of your estate plans?
23. How are decisions made at your family foundation? Who is involved? What is the process?
24. Under what circumstances do you make exceptions to your (giving guidelines, average amount)?
25. I noticed (organization) received an extraordinary gift from your foundation, what made their request so compelling?
26. If that (some objection to getting involved or giving voiced prior to solicitation) was not an issue, in which of our priorities would you be interested? What would you most want to accomplish?
27. What role does the CEO play in your philanthropic decision-making? (What roles does the board play?)

28. Endowment gifts play a very special role in the life of an organization. Have you made endowment investments in the past? (Brief explanation if unfamiliar) Would you be interested in learning more (exploring options)?
29. There are many ways to (care for your children) (care for grandchildren) (ensure your money lasts your lifetime) while still accomplishing your philanthropic goals. Would you be interested in exploring some of them?

Versions of some questions which are especially helpful to gift planning professionals

1. You've been so supportive of us over the years, have you thought about including us in your estate plans? Can you tell me about that? Was anyone else involved in the decision? Who?
2. To what extent do your current interests dovetail with those your spouse had when she was alive? How important is that for you?
3. May I ask, what other organizations are included in your estate plans? How did you decide who and how much? Where do we fit among them?
4. Who else knows about your wishes to (fill in what he or she has said is important and why your organization is in the will)? How do they (he, she) feel about that? How supportive are they? We'd love to meet them. How might we arrange that?
5. I hope you enjoyed the (fill in the personalized stewardship you provided). Did you have a chance to share it with (other decision makers, other members of the family you know are important or will be)? What did they think?

Feelings about Planned Giving Versus, or In Addition to, Outright Giving

1. Some people believe it is important to leave respected and beloved charities in their will. What are your feelings?
2. How does your family feel about that?
3. Thank you for your inquiry about bequests (annuities), what inspired your query? Why now? Why us?
4. As you think about all your financial and philanthropic aspirations for yourself, your family members, and the causes you care most about, which are the most important for you?
5. What are some of your challenges or worries?
6. Do you have a trusted advisor to help you think through your goals and challenges? When you feel it might be helpful, we would welcome an introduction so that we are all helping you achieve your personal goals.
7. Are others involved? Who? How might we engage them in our mission, vision, and work?
8. I was reading an article about Warren Buffett. He was talking about the importance, for him, to give while he is alive and can enjoy his gifts. Clearly, he also believes in leaving money in his will. What is your take? Is that true for (other decision makers mentioned)
9. Have you ever made an estate or deferred gift to a charity? How did that come about? How is it working out?
10. Under what circumstances might you consider including our organization in your estate plans? How could we move that forward?

Engagement

1. How have you been involved with other organizations? What was that experience like?
2. As you think about the most satisfying volunteer experience you've had, what was key?
3. We would very much like to have you involved with us and would like to find the right match for your skills and interests, may I share with you some opportunities that come to mind? What appeals to you? Why? (Why not?)
4. How can we get you more involved with us?
5. Would you be interested in helping us identify and engage others?
6. Would you be willing to review a list?
7. Who among your friends and acquaintances might be moved by our work?

8. What one piece of advice would you give us as we plan our future?
9. We would love for you to (insert involvement request here) is that something you would find of interest?
10. It is important to us that our donors and volunteers have satisfying experiences as they help us achieve our vision. How can we best help you, help us?
11. We would love for you to make a site visit, how can we make that happen?
12. Under what circumstances do members of your family foundation board participate in (activity) of organizations with whom you have relationships?

Additional Pandemic Questions

1. You've always given us such good advice. We're working remotely and trying to keep it meaningful and productive for our team. May I ask, how are you managing your team? What do you see working?
2. With so many events cancelled, we are still trying to stay in touch with our (alumni) (volunteers) (philanthropic investors) (board members). I've always found you strategic and creative. How are you accomplishing that with your clients (partners) (customers)? What suggestions do you have for us?
3. One of our biggest concerns is the impact on the people we serve. I know you care about many causes. How are you thinking about your philanthropy and volunteer service during these troubling times?
4. To stay in touch and keep our stakeholders informed, we're hosting several online events over the next few months. May I run some of them by you and hear your thoughts?
5. We just emailed you a message from (name of sender – CEO, board leader, program person, well known donor). Please look at it. Once you've read it, may I check in and get your impressions (thoughts) (suggestions)?

Attitude and Values Questions

1. How and why have you settled on your life's work?
2. What are the guiding principles that have helped you achieve in your business life? (Personal life?) (Philanthropic life?) (Volunteer life?) How is that the same or different for your spouse? Members of your family?
3. What is the best business decision you've ever made? How so?
4. What is the best personal decision you've ever made? How so?
5. What is the best philanthropic decision you've ever made? What was the impact of that decision?
6. What values do you think people who work in an organization like ours should possess? To what degree do you believe our leadership and staff members share those values? To what degree do you share those values?
7. To what extent does our mission (vision, work) dovetail with your beliefs? How so?
8. If you could pass along a lesson to (your children) (grandchildren), (the people you help with your philanthropy) what would that be?
9. What do you expect from the charitable organizations in which you are involved? How well are those expectations met? Which organizations do this well? Tell me about that. Does your spouse feel the same?
10. How have other organizations demonstrated to you the impact of your philanthropic investments?
11. How do you like organizations to demonstrate their appreciation for gifts you have made?
12. If I could demonstrate to you the true impact of your philanthropy, would you prefer something named for you or someone you love or admire; meeting some of the people you have helped; hearing from some of the people you have helped; receiving a report or video or phone call on how your money has been spent; all of the above.

13. How important is it to you to have an impact on the future through your philanthropy? How do you hope to achieve that? What role do your estate plans play?

Additional planned giving questions

1. We are listening to and sharing the philanthropic life stories of our most loyal donors, people just like you. I'd love to hear about your philanthropic journey. How did you learn to be generous? What have been your best experiences? How important is it to you to continue that legacy? Can you say more about that?
2. If we could help you continue that legacy, would you be interested in learning more?

Testing the "Rights" and for Readiness, Closing and Commitment

1. I remember you saying that (insert appropriate constituency) is important to you, is that right?
2. If I understand you correctly, what you'd like to see is (project, impact previously shared)?
3. As you think about making a real difference, what projects (priorities, programs, giving opportunities, naming opportunities) have the greatest appeal?
4. We would like to come and speak with you, over the next few weeks (days, months), about making an investment in our organization. Who should be a part of that conversation?
5. As you think about our organization's ambitious goals for the future, which of our priorities are the most important to you? How would you rank the others?
6. As you know (insert priority) is a critical piece of our commitment to the nation (the world, etc...) is that something with which you agree?
7. We would love for you to consider including us in your estate plans. Is that something we could discuss? Who else should be part of that conversation?
8. As you consider (insert problem societal problem you are solving and she is interested in) would you be interested in learning how you could have a lasting impact (consider adding "in perpetuity" if seeking an endowment gift) on solving that problem (on the people, environment, animals) we serve?
9. You've shared with me the tremendous impact you believe this project will have on the lives of the people we serve including (impact summary). Is that correct?
10. Then, may I suggest a next step of....?

Overcoming Objections or Soft Answers

1. (Objection: "That's a lot of money.") It sounds like you're wondering why we need that amount in order to get the impact we've discussed. Am I correct? The reason is....
2. (Objection: "We're over committed.") It sounds like you would like to invest in our organization, but right now you can't see how you might do that. Am I right about that? Would it be helpful if I explained some of the ways others have managed this problem? They....
3. (Objection: "We don't believe in giving to operating. It's just a black hole." "We don't believe in giving to endowment.") Perhaps you'd like to know specifically how your gift would be used. Would that address your concern? Here's how (unrestricted gifts) (endowed gifts) make a powerful and specific impact on the people we serve...*
4. (Objection: "We're living on a fixed income. We can't be as generous as we were." "We're paying for our grandchildren's education and have to think about their future.") It sounds like you would like to invest in our organization, but personal (family) issues are top of mind. If I could show you a way to (restate the problem) and still make an investment in our organization, would you be interested in exploring some possible solutions? May I share with you how others have managed similar issues?
5. (Objection: general problems like economy, business) If (restate objection) were not an issue, what would you like to be able to do for (area of giving interest and motivation)? May I share with you how some others have managed similar concerns?
6. (Soft answer: "Let me think about it and I'll get back to you.") What factors will you consider as you weigh our request?

7. (After objection is stated) “So, you’re concerned about (restate) is that correct? I remember the last time we met you said that it was important to you that (what the gift would accomplish), has that changed for you?”

Follow-up Questions

1. How so?
2. Can you clarify that?
3. Can you give me an example of what you mean?
4. Do you have any questions about what I just said?
5. What specific results are you looking for?
6. Can you say more about that?
7. Did I understand you correctly when you said...?
8. Did I answer your questions?
9. How did that come about?
10. What did that mean to you and your family?
11. How do you feel about that?
12. How strongly do you feel about that?
13. What do you think about that?
14. What is most important to you?
15. Are we in agreement?
16. Are you ready to move forward?

If you would like to learn more about Asking Strategic Questions and Listening for Intent, or any aspect of major gift work, fund development, management or institutional advancement, contact us at 914 428 7777 or email to mail@theosbornegroup.com

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