

Strategic Questioning for Development Officers

About Your Institution

- How did you come to choose (name)? How did your child (grandchild) come to choose (name)?
- What were some of your best experiences as a student here? What is your child (grandchild) enjoying the most?
- I see that you are class of (fill in blank). Do you know (fill in blank)? (blank should be a good donor and volunteer)
- When were you last back to campus? What brought you? What were your impressions?
- In what positive ways has (name) influenced your life? (Influencing your child's life?)
- Which faculty members or administrators made an impact on your life? (Are making an impact on your child's life?)
- With whom are you still in touch?
- How do you feel about (name) today? What do you know about us?
- Why do you support (name)? Why have you supported (name) in the past?
- I noticed you haven't supported (name) in a number of years, what changed for you?
- How well do you know (latest innovative programs)? What are your impressions?
- What do you believe are the perceptions of (name) in the community? Region? Nationally?
- What are your perceptions of our effectiveness in graduating students with strong values, ready, willing, and able to work effectively (attend the best high schools, attend the best colleges)?
- What are your impressions of our vision for the future?
- Do you believe we have a strong case for philanthropic investment? If so why? If not, why not?
- What inspired your recent gift to us?
- What made your recent gift possible?
- How do you feel about the gifts you make to (name)?
- Do you believe your gifts to us are making a difference? If so how?
- To what degree do you feel we use your investments wisely?
- Whom do you know on our Governing Board? Alumni Board? Board of (name)?
- What is your impression of our Boards?
- What is your sense of Board's reputation within in the community (among our alumni, parents)?
- What are your impressions of our publications?
- What have you read from us that you have enjoyed? (Found helpful? Found informative?)
- Have you attended any of our events? Which ones? How did that come about? What was your impression?

- Do you have any particular concerns you would like me to share with our (Head) (President) (Chancellor) (Board)?
- Do you feel you know our (Head) (President) (Chancellor) and how do you feel about (name) under his/her leadership?

Your Network

- With whom among your classmates (fellow parents, grandparents) are you still in touch?
- How connected do you feel to your classmates (fellow parents)?
- To what degree do you use social networking to connect with classmates and friends?
- How else do you stay connected?
- Which social networking sites do you find the most useful, enjoyable?
- How might the institution use social networking to connect with (young alumni) (alumni) (parents and grandparents)?
- How else might we connect with our (young alumni, alumni of your era, alumni, parents)?
- What is the best way to connect with you?

Mission, Vision, Work and/or Project and/or Campaign Priority

- What are your impressions of (our vision for the future) (our strategic plan) (our bold ideas) (our aspirations for our students)?
- In what ways do you find our case for philanthropic investment strong and compelling? How would you make it more compelling?
- As you consider our alumni (parents) (grandparents) (friends), how might we position our (vision) (plan) (ideas) so they would see the importance of their roles as stakeholders?
- To what extent do you believe (the need for girls to learn math and science) (the need for affordable, private education) (the need for every young person to understand global environmental issues) are serious problems for our (community, state, region, country, or world)?
- In what ways do these (did these) issues affect you, your family, your neighbors, your beliefs, your values?
- What impact do you believe achieving our vision will have on the university (school) (college) (community, nation)?
- So, what you'd like to see is (girls having access to math and science in a supportive environment) (schools with the [sep]ability to provide opportunities for all deserving students) (our school providing innovative education about the global [sep]economy)?
- As you (read, heard) our vision for the future, in what ways to do you see our institution effectively addressing these issues?
- Are there other ways the institution could help solve this problem?

- In what ways might you help us address these issues?
- What do you believe our (staff) (faculty) (Board) (closest friends) (alumni) (parents) should do to help make this vision (these ideas) (this plan) a reality?
- Are there any questions about our vision, mission, work, or priorities that we've not answered?

Personal and Lifestyle

(These questions should come from observations around the home or office, prior knowledge, etc.)

- What are the ages, names of your children? Grandchildren? Where do they live?
- Do you get to see your grandchildren often?
- You must have your hands full with little ones, how do you juggle career and parenting?
- 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?
- Do you enjoy entertaining in your home? Do you entertain for business? Do you ever entertain for philanthropic groups? Tell me about that.
- How's business? How is this economy affecting you? Your business?
- How does the economy (your business situation) effect your philanthropic decisions?
- 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?

World View, Philanthropy and Giving Interests

- What do you hope to accomplish with your philanthropy? Is that true for your spouse as well? What are her/his philanthropic goals?
- What role does passion for a cause, project, or outcome play in your philanthropic decision-making?
- How do you uncover that passion? How have organizations and institutions you care most about succeeded in tapping into your passion?
- If money were not a consideration, what would you like to accomplish with your philanthropic investments?
- What other organizations do you currently support? Volunteer for? Serve on the board of? What does your spouse support?
- To what degree do you include your children in your philanthropic decision making?
- How have you taught philanthropy to your children (grandchildren)?
- Which are your top three and why? Is that true for your spouse as well? Which are his/her top three?
- Where does (name) fit on your (your family's) list (if not among the top three)?
- What are your expectations of the organizations in which you invest? Is that true for your spouse (your children)?

- As you think about the enterprise of education in this country, what do you think is its greatest contribution? To what degree do you believe that contribution is essential? Do you see our institution contributing in those ways? Does your [REDACTED] spouse feel similarly?
- What values underpin your philanthropic decision-making? To what degree do you share values with our institution?
- When you give, do you give both annually and to capital projects? To what degree is that true for your spouse?
- 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)?
- What capital gifts have you given that have given you the most satisfaction? Made an impact?
 - How did it come about? What was the impact? What made it so satisfying? Are you still involved with them?
- 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?
- 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?
- Under what circumstances would you be willing to make a stretch, capital gift to a charity? To (name)? What role would your (spouse, your children, a financial advisor) play in that decision?
- Among our fund raising priorities, which do you find the most compelling? Why? Least compelling? Why?
- What factors go into your philanthropic decisions?
- In our household my spouse and I make all of our giving decisions together, how does it work in your household?
- Is (name) part of your estate plans?
- What role does the (Head, President, Chancellor) play in your philanthropic decision-making? (What role does the board play?)
- How are decisions made at your family foundation? Who is involved? What is the process?
- Under what circumstances do you make exceptions to your (giving guidelines, average amount)?
- I noticed (organization) received an extraordinary gift from your foundation, what made their request so compelling?
- 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?

Engagement

- How do you like being involved with the organizations you support? What is most satisfying about that?
- How can we get you more involved with (name)?
- Would you be interested in helping us identify and engage others?
- Would you be willing to review a class list? School list? Area list? Parent list?
- When was the last time you visited the campus? What was your impression? Would you be interested in visiting?
- What one piece of advice would you give us as we plan our future?
- What one piece of advice would you give our students as they consider their futures?
- We would love you to (insert involvement request here), is that something you would find of interest?
- 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?
- We would love for your foundation board members to make a site visit, how can we make that happen?
- Under what circumstances do members of the foundation board participate in (activity) of organizations with whom you [SEP] have relationships?

Attitude and Values Questions

- How and why have you settled on your life's work?
- 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?
- What's the best business decision you've ever made? How so?
- What's the best philanthropic decision you've ever made? What was the impact of that decision?
- What values do you think people who work in an institution like ours should possess? To what degree do you believe our faculty and staff share those values? To what degree do you share those values?
- To what extent does our mission (vision, work) dovetail with your beliefs? How so?
- If you could pass along a lesson to (your children) (grandchildren), (the people you help with your philanthropy) (our students) what would that be?
- What do you expect from the charitable organizations in which you are involved? How well are those expectations met? [SEP] Which organizations do this well? Tell me about that. Does your spouse feel the same?
- How has our school helped shape your values (had an impact on the values of your children, grandchildren)?

- To what extent do you believe our mission impacts the values of our students? Should affect the values of our students? Why?
- How have other organizations demonstrated to you the impact of your philanthropic investments?
- How do you like organizations to demonstrate their appreciation for gifts you have made?
- What typically demonstrates to you the true impact of your philanthropy? Do 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 on how your money has been spent; or all of the above.

Testing the “Rights,” for Readiness and Commitment

- I remember you saying providing scholarships and financial aid for worthy students (technology, opportunities for studying abroad) is important to you, is that right?
- As you think about making a real difference for the students and faculty of (name), what projects (priorities, programs, giving opportunities, or naming opportunities) have the greatest appeal?
- We would like to come and speak with you, over the next few weeks (days, months), about making an investment in (name). Who should be a part of that conversation?
- As you think about the (name) ambitious goals for the future, which of our priorities do you think should be the most important (will have the most important impact)? How would you rank the others?
- As you know (the leadership annual fund program name) is a critical piece of (name) commitment to its present students, is that something with which you agree?
- What do you need from us in order to consider putting us in your estate plans?
- What has been your experience with (name) that led you to consider putting us in your estate plans?
- Is there anything else we need to cover?
- May I suggest a next step of...?

Overcoming Objections or Soft Answers

- **(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....
- **(Objection: “We’re over committed.”)** It sounds like you would like to invest in our school 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...
- **(Objection: “We don’t believe in giving to operating. It’s just a black hole.”)** Perhaps you’d like to know specifically how your gift would be used. Would that

address your concern? Here's how unrestricted gifts make a powerful and specific impact on our students (on our faculty) (on our ability to achieve our vision)...

- **(Soft answer: “Let me think about it and I’ll get back to you.”)** I can certainly understand that. May I ask what factors will you consider as you weigh our request?
- **(After objection is stated)** “So, you’re concerned about (restate) is that correct? If that were not an issue, what would you like to accomplish with a gift to (name)?”
- **(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 very important to you that (what the gift would accomplish), has that changed for you?”

Follow-up Questions

- How so?
- Can you clarify that?
- Can you give me an example of what you mean?
- Do you have any questions about what we just discussed?
- What specific results are you looking for?
- Can you say more about that?
- Did I understand you correctly, when you said...?
- Did I answer your question?
- How did that come about?
- What did that mean to you and your family?
- How do you feel about that?
- How strongly do you feel about that?
- What do you think about that?
- What is most important to you?
- Is that agreeable to you?
- Is this something on which you would like to move forward?