Strategic Questions for Engaging Donors and Prospects in Values Based Conversations

Questions Related to the Prospect’s Perceptions of Your Organization

1. How did you first hear about Organization?
2. How much do you know about the work we do?
3. Do you have any questions about our mission, vision or the work we do that I could answer?
4. What are your overall impressions of Organization?
5. What do you think of our website, publications and communications?
6. How do you get information about us? (email, newsletter, etc.)
7. Do you know any of our staff or board members?
8. Do you believe our leadership is taking the organization in the right direction?
9. Do you have any concerns or comments you’d like me to share with our leadership?
10. Do you know any others who support Organization?
11. What do you think the perception of Organization is in your community?
12. How do you think we could let people in your community know about the work we’re doing?
13. Are there ways you could help us with that?
14. Do you feel the work Organization is doing is meeting a need in your community or the world community?
15. Is there anything else you think we could or should be doing to further our mission?
16. Is there a need or particular area with a need that you feel is currently unmet?

Questions that may come from Observations in the Home or Office

1. Do you have children? Grandchildren? (Try to obtain names, ages, occupations, schools attended, where they live, etc.)
2. Do you get to travel much? Where to? What is your dream vacation?
3. Do you enjoy entertaining? Do you entertain for business? Have you ever entertained for philanthropic purposes? Tell me about that.
4. How is business?
5. Is the current economy helping (or hurting) business?
6. I love your artwork. Where did you get this?
Questions that Concern other Charitable Interests

1. Are there other organizations you support?
2. Do you serve on charitable boards? Are you an active volunteer for any organizations?
3. Do you and your spouse make giving decisions jointly, or do you each make your own giving decisions?
4. How are you involved with other organizations you support?
5. How can we get you more involved with Organization?
6. Would you be interested in helping us identify, educate and engage others?
7. What do you expect from charitable organizations you contribute to?
8. How have other organizations demonstrated to you the impact of your giving?
9. If we could demonstrate to you our appreciation for your philanthropy, would you prefer:
   1. Something named for you or someone you love?
   2. Meeting some of the people you've helped?
   3. Hearing from some of the people you've helped?
   4. Receiving a report on how your money has been spent?
   5. Something else?

Values-Based Lifestyle Questions

1. Do you belong to a faith community? How are you involved?
2. Did you learn philanthropy from your family?
3. How and why did you choose your life’s work?
4. What do you attribute your business success to?
5. Do you have some overarching principles that have guided you in business or in life?
6. What achievements are you most proud of?
7. What do you hope to do in retirement?
8. How does our mission intersect with or complement your beliefs?
9. What life-lessons do you hope to pass along to your children or grandchildren?