

ASKING STRATEGIC QUESTIONS[©] for Health Care

A Resource of The Osborne Group, Inc.

People remember more of what they say, than what you say. People believe what they say, more than what we say. People enjoy conversations in which they speak the most. Therefore, it is our responsibility to elicit the case for support from our potential donors! We want them to tell US whatever we want them to REMEMBER.

Following is a list of sample questions to help you do just that. You can weave them 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 and major gift 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 institution and/or a significant gift to one of your priorities.

About Your Institution

1. How did you (your mother, your uncle) come to choose (name)?
2. What were some of your best experiences with us?
3. When were you last back to visit us? What brought you? What were your impressions?
4. In what positive ways has (name) impacted your life?
5. Which doctors, nurses, or administrators made an impact on your life? (Is making an impact on your family member’s life?)
6. What are your perceptions of our effectiveness in providing outstanding health care?
7. How well do you know our programs? Which ones? How did that come about?
8. What do you believe are the perceptions of (name) in the community?
9. What are your perceptions of our effectiveness?
10. Do you feel good about the gifts you make to (name)? In what ways?
11. Do you believe your gifts to us are making difference? If so how? If not, why not?
12. Do you feel we use your contributions wisely? How do we demonstrate that?
13. Do you believe that we are fiscally well managed? How do we demonstrate that?
14. Who do you know on our Board (our foundation board)?
15. What is your impression of our Board?
16. How is the Board perceived in the community?
17. Who do you perceive are our chief philanthropic competitors in the area?
18. What are your impressions of our publications?
19. Have you attended any of our events? Which ones? How did that come about? What was your impression?
20. Do you have any particular concerns you would like me to share with our CEO, Board?
21. Do you feel you know our CEO and trust (his, her) leadership?

Personal and Lifestyle

1. (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?
2. Do you get to see your children often? Grandchildren?
3. 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?
4. Do you enjoy entertaining in your home?
5. How’s business? How is this economy affecting you? Your business?
6. How does the economy (your business situation) affect your philanthropic decisions?
7. What a beautiful (piece of artwork,) (collection of cars) do you enjoy collecting? Why?
8. How often do you get a chance to get away?
9. Where is your favorite get-a-way?
10. What do you like to collect? Why is that? How did that come about?
11. Are you concerned for your children’s (grandchildren’s) future? How so? What are the implications of those concerns?
12. In what ways do your financial goals dovetail with your philanthropic goals?

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 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 medical facilities in this country what do you think are the greatest contributions they have made? Which of those contributions do you believe are essential?
12. How do you see our institution contributing to the health and well being our community? To what degree does your spouse feel similarly?
13. What values underpin your philanthropic decision-making? To what degree do you share values with our institution?
14. When you give, do you give both annually and to capital projects? To what degree is that true for your spouse?
15. 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)?
16. 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?
17. As you think about your philanthropy, are you most interested in having high quality healthcare available for your family, saving and changing a life, improving healthcare in our community, or having a wider societal or global impact? Can you say more about that?
18. 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?
19. 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?
20. Among our fund raising priorities, which do you find the most compelling? Why? Least compelling? Why?
21. What factors go into your philanthropic decisions?
22. In our household my spouse and I make all of our giving decisions together, how does it work in your household? Can you walk me through the process?
23. Is (name) part of your estate plans?
24. How are decisions made at your family foundation? Who is involved? What is the process?
25. Under what circumstances do you make exceptions to your (giving guidelines, average amount)?
26. I noticed (organization) received an extraordinary gift from your foundation, what made their request so compelling?
27. 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?
28. What role does the CEO play in your philanthropic decision-making? (What roles does the board play?)
29. As you think about your philanthropy, what role does the economy play?
30. When you make gifts in spite of economic uncertainty, what factors went into those decisions?
31. Can you share how your philanthropy has changed over the last few years? Can you give me an illustration?

Engagement

1. Earlier you said that you enjoy your involvement with (x); what do you believe is the impact of your involvement there?
2. What do you believe might be the impact you could have if you got involved with (name)? In what ways?
3. What is your philosophy about volunteering for organizations?
4. How do you feel about the boards on which you serve? Why?
5. What do you believe are the key attributes of an excellent volunteer (board member)? Why?
6. How can we get you more involved with (name)?
7. Would you be interested in helping us identify and engage others? Would you be willing to review a list?
8. Who among your friends and acquaintances might be moved by our work?
9. What one piece of advice would you give us as we plan our future?

10. We would love for you to (insert involvement request here) is that something you would find of interest?

Your Network

1. To what degree do you use social networking to connect with colleagues and friends?
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?

Seeking Engagement and Giving Feedback

1. Did I understand you correctly when you said...?
2. Did I answer your question?
3. Have I done what you've requested?
4. To what degree is your volunteer experience with us satisfying?
5. In what ways is your volunteer experience satisfying?
6. Are there ways in which we can make your experience more meaningful?
7. To what extent have we provided you with the tools and information your need (to make a decision, to carry out your responsibilities, to understand our mission, vision and work?)
8. Have we done a good job in conveying to you the impact of your gift?
9. What aspects of our communication with you have conveyed the (tremendous) impact of your giving?
10. Does (other philanthropic decision maker) feel the same way?

Mission, Vision, Work and/or Project

1. To what extent do you believe the needs of (the community) (the disabled), (families) (children) (employers) (lack of support for families suffering from age related disabilities) affect our (community, state, region)?
2. In what ways do these (did these) issues impact you, your family, your neighbors, your beliefs, your values?
3. What are your impressions of (our vision for the future) (our strategic plan) (our bold ideas) (our aspirations)?
4. In what ways do you find our case for philanthropic investment strong and compelling? How would you make it more compelling?
5. To what extent do you believe (the mission we have, issues we're solving) are serious problems for our (community, state, region, country, world)?
6. In what ways do these (did these) issues impact you, your family, your neighbors, your beliefs, your values?
7. As you (read, heard) our vision for the future, in what ways to do see our institution effectively addressing these issues?
8. Are there other ways we could help solve this problem?
9. In what ways might you help us address these issues?
10. 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?
11. What impact do you believe achieving our vision will have on your family, our community, our state, the nation, global society?
12. What do you believe our (staff) (program staff) (Board) (closest friends) should do to help make this vision (these ideas) (this plan) a reality?
13. Are there any questions about our vision, mission, work, priorities that we've not answered?

Probing for Attitude and Values

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?)
3. What's the best business decision you've ever made? How so?
4. What's the best personal decision you've ever made? How so?
5. To what extent does our mission (vision, work) dovetail with your beliefs? How so?
6. If you could pass along a lesson to (your grandchildren) (the people you help with your philanthropy) (other organizations like us) what would that be?
7. What do you expect from the charitable organizations in which you are involved?
8. What do you value most in your philanthropic giving?
9. What do you value most about the impact charitable organizations achieve in our community (state, region, country)?

10. How have other organizations demonstrated to you the impact of your giving?
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; 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; all of the above.

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 (more opportunities for children with disabilities to learn with other children), (more employment opportunities for adults with disabilities) (more people receiving assistance making it on their own) (more able bodied children interacting with a diverse group of children) (more people given hope)?
3. As you think about making a real difference, what projects (priorities, programs, giving opportunities, naming opportunities) have the greatest appeal?
4. Of all the things we discussed today, what has been the most helpful (interesting) to you?
5. Would you share your thoughts with me about the things we have discussed?
6. Of what we have discussed today, what has made the most sense to you?
7. As you know (insert priority) is a critical piece of our commitment to the community (the world, families, children, etc.) is that something with which you agree?
8. 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?
9. Then, may I suggest a next step of...?
10. So, as we agreed, we will come and speak with you in the next few days (weeks, months) about (insert what was agreed), who should be a part of that conversation?
11. As you think about our ambitious goals for the future, which of our priorities do you think should be the most important? How would you rank the others?
12. Are you ready to move ahead?
13. Are we in agreement?
14. Is there anything we’ve not discussed that would be helpful (important) to your ability to make a decision?
15. Is (name) a part of your estate plans? Is that something in which you might have an interest?
16. If you were to leave a legacy by making a philanthropic gift, what kind of legacy would you desire?
17. If I could show you a way you could achieve your financial goals as well as make a generous gift to (name), would you be interested?

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 overcommitted.”) It sounds like you would like to invest in our affiliate 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.”) 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 the people we serve...
4. (Soft answer: “Let me think about it and I’ll get back to you.”) What factors will you consider as you weigh our request?
5. (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)?”
6. (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

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 question?
9. How did that come about?
10. What did that mean to you and your family?
11. How do you feel about that?
12. What do you think about that?
13. Are we in agreement?
14. 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, management or fund development, contact us at www.theosbornegroup.com or 914 428 7777 or send an email to mail@theosbornegroup.com

The Osborne Group is a full service management, consulting and training firm specializing in philanthropy including campaign planning, feasibility studies and campaign implementation; opinion research including market research, customer satisfaction, donor satisfaction; and organizational development including strategic planning and board development.