

ASKING STRATEGIC QUESTIONS[©]

For Organizations

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 organization and a significant gift to one of your priorities.

About Your Organization

1. What do you know about our mission, vision and work?
2. How do you feel about our mission, vision and work?
3. Why do you support us?
4. How well do you know our programs? Which ones? How did that come about?
5. What do you believe are the perceptions of our organization (nationally, in the community, region, state)?
6. What are your perceptions of our effectiveness?
7. Which aspects of our programs do you believe are our greatest strengths?
8. In what ways do you feel good about the gifts you make to us?
9. Do you believe your gifts to us are making a difference? If so how?
10. Do you feel we use your contributions wisely, that we are fiscally well managed?
11. Who do you know on our (Committee, Board)?
12. Who do you perceive are our chief philanthropic competitors?
13. What are your impressions of our publications? Which ones do you get, read, like?
14. Do you feel more informed about our mission, vision and work as a result of reading our publications? More informed about how your gifts are used? More informed about our priorities and plans for moving forward?
15. Have you attended any of our events? Which ones? How did that come about? What was your impression?
16. Do you have any particular concerns you would like me to share with our CEO, volunteer chairs, Board?
17. Do you feel you know our CEO and trust his/her leadership?
18. What are your impressions of our CEO? Why?
19. What are your impressions of our senior administration? Why?
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)?
21. Have you had an opportunity to meet with any of the people we serve? Under what circumstances? What were your impressions?

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? How would you make it more 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. Are there other ways we could help solve this problem?
7. In what ways might you help us address these issues?
8. 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?

9. What impact do you believe achieving our vision will have on the people we serve, our community, our state, the nation, global society?
10. What do you believe our (staff) (program staff) (Board) (closest friends) should do to help make this vision (these ideas) (this plan) a reality?
11. Are there any questions about our vision, mission, work, priorities that we've not answered?

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?

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? Tell me about that.
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, do you enjoy collecting?
8. In what ways do your personal interests impact your volunteer activities, philanthropic investments?
9. 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

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 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 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?)

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?

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'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. What's 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 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?
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) (our students) 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 on how your money has been spent; all of the above.
13. To what extent does our mission (vision, work) dovetail with your beliefs? How so?
14. 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?
15. What do you expect from the charitable organizations in which you are involved?

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 do you think should be the most important? 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. Are we a part of your estate plans?
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....?

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.”) 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 our organization”
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 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 www.theosbornegroup.com or 914 428 7777 or send an email to mail@theosbornegroup.com

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