



Strategic Questions for Qualifying Prospective Donors©

Qualifying prospective donors requires confirming or uncovering very specific information. You want to make sure the donor has the capacity to give a leadership annual, major or principal gift depending on your circumstances. You want to know if the donor is generous and philanthropic in general and you want a read on his or her feelings about the societal issues your organization addresses.

Ideally, you also want to know who makes the philanthropic decisions. If there are additional decision makers, how do the others feel about philanthropy, are they generous, and do they care about your societal issues. Following are a list of strategic questions that will help you confirm, determine, or surmise this vital information.

Remember, strategic questions are part of a give and take conversation. They require active listening, asking follow-up questions and being genuinely interested in the answers!

Based on what you know about the donor or learned through research, choose a few questions from each section below to ask on a qualifying visit. Try to qualify your prospective donors during that one visit.

Feelings about the Societal Issues Your Organization Addresses

1. As you think about (insert issue), what are some of your biggest concerns?
2. In what ways do these (did these) issues impact you, your family, your neighbors, your beliefs, your values?
3. What do you believe is needed to address those concerns?
4. To what extent do you believe organizations like ours are making a difference?
5. When you think about our organization, what descriptors come to mind?
6. From your perspective, in what positive ways has our organization influenced (actions) (changes)?
7. What do you believe are the perceptions of our organization in the community? Regionally? Nationally? Internationally?
8. What are your perceptions of our effectiveness?
9. To what extent do the values of our organization dovetail with yours?
10. How are you currently feeling about our organization as a force in the (your societal issue) movement?

Philanthropic Values and Attitudes

1. What do you like to accomplish with your philanthropy?
2. What do you expect from the charitable organizations in which you are involved?
3. What other organizations do you currently support? Volunteer for? Serve on the board of?
4. Which are your top three? How did that come about?
5. What factors go into deciding your philanthropic priorities?

Capacity to Give and Generosity

Here you are looking for indications of wealth, so your observations are as critical as your questions. Are there original pieces of art, antiques, multiple plaques from other charitable organizations? You are also trying to determine generosity (how he or she determines and/or thinks about what is right in terms of giving time, treasure, talent and contacts)

1. How did you learn to be generous? How have you taught your (children, grandchildren, family members)? How important is it to you to pass along your philanthropic values?
2. How's business? How is this economy affecting you? Your business?
3. Of all the gifts you've made, which gave you the most joy? How so?
4. As you make your philanthropic decisions, what factors do you weigh? How do you decide how much is right to give away each year?
5. When you give, do you give both annually and to capital projects?
6. What capital gifts have you given that have made a real impact?
7. Have you had a chance to take some time off this year? (If so) Where did you go? (If not) Are you planning anything special?
8. Do you enjoy entertaining in your home? Do you entertain for business? Do you ever entertain for philanthropic groups? Tell me about that.
9. Do you serve on any boards? Which ones?
10. 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?

If you would like to learn more about asking strategic questions, listening for intent, using questions to advance relationships, the role of questions in solicitations or any aspect of annual, major gift, or principal gift fundraising contact us at mail@theosbornegroup.com or 914 428 7777.

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