



Prospective Donor Question Guide: *Answer these questions before making an ask*

General Recommendations:

- Ask open-ended questions.
- Start with broad questions, and follow up with natural curiosity that leads to more depth and specificity.
- Your goal is to peel back the layers of the onion and get to the core.
- Go for the “why” and understand their perspectives, ideas, and dreams.
- Listen fully, wholeheartedly, and with sincere curiosity.
- In addition to what they say, pay attention to what they *don't* say.
- Silence is powerful. Allow a healthy silence after the question to let them process and respond.
- Non-verbal: Maintain eye contact, gently mirror their pace of speech, body language, cadence, etc.

General information about donor’s experience related to your institution:

1. Why did you choose to attend [institution]?
2. Tell me about what it was like in [institution’s location] as a student?
3. What was the most meaningful part of your education here?
4. What do you value most about [institution]?
5. What do you remember most about your time here?
6. Why do you stay connected?
7. What are your hopes for your alma mater?
8. How are you feeling about the direction [institution] is headed?
9. What do you think of [President XXX’s] [new strategic plan]?
10. What role, if any, did [institution] play in your success today?
11. Was there a moment of insight during your time at [institution] that really changed your path?
12. When you talk to your friends about [institution], what do you tell them?
13. How would you like to be involved this year?
14. What has been meaningful to you about your involvement here at [institution]?
15. Where do you feel the mission of [institution] aligns with your values?
16. I’ve heard you say that [institution] made a huge difference in your life. Tell me more about that. How did it help shape who you are today?



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Getting to know the donor's general perspective and passions:

17. Tell me about your view of the world.
18. In addition to your role as [job, volunteer position they hold, family role, something they have mentioned to you], how do you spend your time?
19. What keeps you busy when you're not _____? (e.g., at work, with the grandchildren...)
20. What hobbies do you enjoy?
21. What are your passions?
22. What is most important to you?
23. What part of our work interests you most?
24. What keeps you up at night?
25. What troubles you most about the state of [the country, humanity, political party, education... whatever the conversation is about]?
26. What do you think is the solution? *A favorite follow-up to complaints about anything – or the question above. The answer to this question is one of the best philanthropic clues. Align their ask with the solution to their greatest concern.*
27. I'm sensing a theme, you seem to be very passionate about _____. Why? How did you come to believe so strongly in this? *Then take it a little deeper – once you've uncovered a passion, get to WHY. What is the driving motivator behind the passion?*
28. What's been the best business decision you've ever made?

Understanding a donor's capacity, beyond wealth screening:

29. Did you get away for any vacations this past summer? Any upcoming travel? What are your favorite travel destinations?
30. Oh, you have kids? How old? Where are they? What are they doing?
31. Sounds like business is good. How many employees are you up to now?

Understanding their philanthropy – and where your institution ranks in priority:

32. How did you come to be so generous?
33. Why do you give back?
34. Why do you pay it forward?
35. What inspired your first gift?
36. What shapes your giving?
37. What do you hope to accomplish through your philanthropy?
38. How would you like to leave this place better than it is now?
39. What kind of legacy do you want to leave?



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40. How do you want to be remembered?
41. How would you describe the impact you'd like to make in your lifetime?
42. What is most important to you regarding your philanthropy?
43. What mark do you hope to make through your philanthropy?
44. If you made a major gift, what would you like to accomplish?
45. What are your top three giving priorities?
46. What is it that dissuades you from giving?
47. What has been your most rewarding giving experience?
48. What has been your most meaningful giving experience?
49. What is the best philanthropic decision you've ever made?
50. What has been your worst giving experience? (no names)
51. Have you ever thought about giving back to your alma mater? (if they have never given)
52. If money were no object, what would you do to transform [institution] and leave your legacy?
53. Do you feel that your giving to [institution] is making a difference?
54. Do you feel that your giving to [institution - name specific gifts] is accomplishing your philanthropic strategy/goals?
55. Who would you like us to include in philanthropic discussions with you?

Consider lapsed donors:

56. Thank you for your past support. I understand you gave to the [institution] for quite a few years, and I noticed that you haven't given in a while. Can you share what caused that change in your giving?
57. Thank you for your past support of [the project/fund] several years ago. We have a new initiative that is similar in scope and impact. [The project/fund] is focused on [XXXX]. Is this a project that you might be interested in supporting?

Consider their financial concerns in structuring an ask/giving vehicle:

58. What are your most pressing financial concerns? (e.g., running out of money, medical expenses, caring for children and grandchildren)
59. How would you describe your investment strategy?
60. Have you considered making your gift using your Required Minimum Distribution (RMD)? *For donors 70.5+*



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Ask for feedback:

61. How can we improve?
62. What would you like to see changed or done differently?
63. What are your impressions of [institution]?
64. What do you think about [insert topic relevant to institution or their passions]?
65. Who else needs to be involved, and what would make them feel great about joining the cause?

Keep them talking:

66. Why do you believe that?
67. Tell me more about that.
68. Why do you feel that way?
69. What haven't I asked that I should?
70. Are there any questions I can answer for you?

Reflect their feelings to ensure you are on the same page:

71. What I'm hearing you say is...
72. I've noticed you seem to be really passionate about [XXX]...
73. It sounds like...
74. So if I'm understanding you correctly, you're saying...

Ask for referrals:

75. Who else should I be talking to?
76. Is there anyone you think I should reach out to and engage in this conversation?

When they say something outrageous and you don't know how to recover:

77. Really, I hadn't thought of it that way. Tell me more.
78. That's a solution I hadn't considered.
79. That's one way to approach it.
80. You might be right.
81. That's a consideration.
82. Ok, I hadn't looked at it that way.
83. That's an idea.
84. That's a powerful conviction. Tell me more.



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Responding to negative feedback or the grumpster: (*Most importantly: MAKE THEM FEEL HEARD)

85. I hear you.
86. Tell me more about this.
87. What is most upsetting to you about this?
88. How does this change how you feel about [institution]?
89. I see your point.
90. You're not wrong.
91. You might be right about that.
92. You aren't the first person I've heard this from.
93. How can we do better?
94. What can we improve?
95. How can we make this right?
96. What do you recommend?
97. If you could wave a magic wand, how would things be?
98. Thank you so much for sharing your feedback.
99. Your insight is critical.
100. The only way we can improve as [a university/advancement] (or whatever the concern) is to listen to what's not working and improve it. Thank you for sharing.
101. Your candid feedback is critical.
102. I can see you feel so strongly about this/your alma mater.
103. I'm so grateful for alumni like you, who are so committed to the well-being of their alma mater.
104. We are lucky to have passionate alumni like you.
105. Thank you for taking the time to share your insight. So many alumni wouldn't take the time—we need more people like you with your commitment. Thank you.
106. How would you like to proceed?



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COVID Additions

General COVID-reflective questions:

- What have you learned about yourself this year?
- How has the past year changed how you look at the world?
- What has come into focus as a result of your experiences in 2020?
- What is more evident to you this year?
- What has become more important to you over the course of the past year?
- What are you more dedicated to as a result of your experiences last year?
- Now, more than ever, what are you most grateful for?

Shift in action:

- How have your priorities shifted?
- What do you hope will change in 2021?
- What did you ignore before, that you cannot ignore moving forward?
- What problem will you try to solve in 2021 and beyond?
- What do you want to spend more time doing this year?

Philanthropy conversation:

- We are sincerely grateful for your support of [institution/fund/project] over the years. What a difference you have made. Does this remain a priority for you moving forward?
- I'm hearing that [XXX] is very important to you right now. How can we adjust your endowment/giving to more fully accomplish your philanthropic goals?

Follow-up questions:

- How so?
- Tell me more.
- Why do you think that?