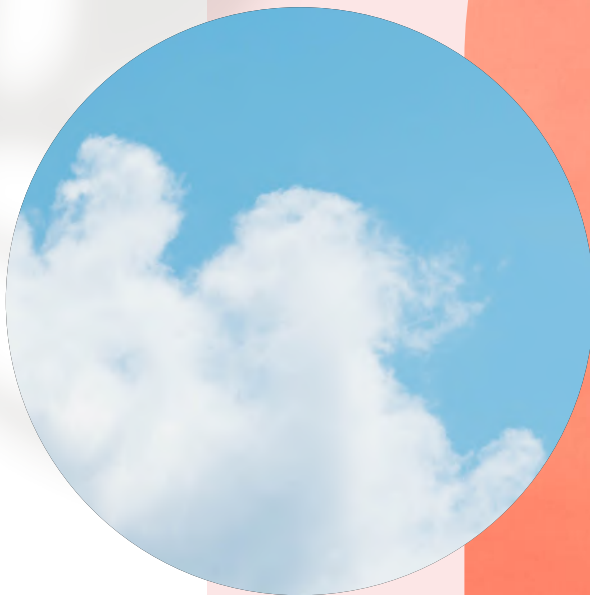




# Getting to Know You:

42 Questions to Ask Major Donor Prospects  
Before You Ask for a Gift



# Summary

Major gifts happen when there's a match between the values your organization enacts and the values your donor and you share. It's your job to uncover your donor's values and to help them discover your organization's values.

Make this a deliberate process. If you don't intentionally make this your job, it won't be possible to make a match made in heaven.

Before you ask for a major gift, your assignment is twofold:

1. Assure you know enough about your donor.
2. Assure they know enough about you.

# Introduction

The most under-acknowledged major gift fundraising truism: It's about the relationship, not the "ask."

Too often development directors, major gift officers and even board members are asked to identify prospects and then go ask them for a gift. This puts the proposal cart before the relationship-building horse.

If you ask too soon, you'll get less than you could. Because you've made it more about the transaction than the relationship. Transactions only skim the surface.

If you want your donor to dig deep, they must be inspired. They must be moved. They must trust that you value what they value, and that you'll collaborate with them to enact their passions, fulfill their dreams and help them be the heroes they long to be.

Your success depends less on how well you ask for gifts and more on how well you've taken your major gift prospects on a journey with you – one in which you've built a strong and personal relationship with them.

## **Put the relationship-building 'horse' before the fundraising 'cart.'**

Rather than rushing to make an appointment with folks to tell them about your project, instead set up a visit so they can tell you about themselves.

Appointments are no fun. Visits are. You make 'appointments' with dentists and auto mechanics. You have visits with friends.

While you may be tempted (or pushed) to set up appointments to sell your proposal and ask for money, really the best way to do that is to set up visits where you ask your prospects questions about themselves and listen to their answers.



## “Getting to Know You” Questions

Here are some sample questions you can use to get prospective donors talking about the things that interest and motivate them - before you start telling them about your project. The better you get to know folks, the better you can tailor your proposal to their interests.

### Questions About the Donor: Please Tell Your Story

People love to talk about themselves. About their career, their kids and grandkids, where they’ve lived, and how they got to where they are. It’s easy for people to talk about what they know best, so it’s a great way to begin your conversation. It also gives you an opportunity to connect with them on a personal level (perhaps you’ve visited their city of birth, attended their college or can relate to other tidbits they share).



Listen carefully. A lot of successful relationship building is about empathy. When a donor tells you their story, try to jump into it with them.

1. Where were you born?
2. How did you get where you are today?
3. What were the most important lessons you learned from your parents?
4. Would you tell me a bit about your family?
5. If you won the lottery, how would you spend your time?
6. What are you most proud of?
7. If you could leave a legacy for future generations, what would it be?



## Questions Asking for Advice: Please Share Your Wisdom

People love to give advice. So much so, in fact, that there's an adage in major gift fundraising: "If you want advice, ask for a gift; if you want a gift, ask for advice."

8. What do you think about \_\_\_\_\_ ? (Ask them about a project or a campaign; see if they think it's something your organization should be doing).
9. Please give me your guidance on \_\_\_\_\_ ? (Ask them about how they might recommend getting people interested and involved. Where do they think the necessary philanthropy might come from?)
10. What do you think we should do? (Ask them if they have other suggestions/ways to approach this issue).





11. Are there others you would recommend we contact to brainstorm this idea? (Draw them in further; help them to see themselves as a leader and contributor at the ground level. This question also lets them know you'd like them and their network involved).
12. How would you approach next steps if we want to bring this project/campaign to fruition?
13. Can you tell me more about that? (This, by the way, is one of my favorite questions. It demonstrates that you really care to hear their thoughts. Plus, you'll often get your most valuable information when you ask something this open-ended).



## Questions About Philanthropic Giving

Most people you'll meet with were not born yesterday. They know why you want to meet with them. So why not be upfront about it? I will usually give prospective donors a heads up that I'd like to talk with them about their philanthropic interests and get their advice.

### Don't feel shy about this.

Talking about philanthropic interests is not the same as making a proposal (yet). But alerting folks to the fact you'll want to engage them on this topic (among other topics) makes it much more comfortable for you to ask the important


"getting to know you" questions that will increase the likelihood you'll get a "yes" to your proposal once you do make it.

14. What shapes your philanthropy? (Is it personal values? Family consensus? Shaped by current events?)

15. What are your top three giving priorities? (This is a great question, because sometimes you'll find a passion your donor has that ties into one of your programs of which they might not even be aware. For example, while working for a social services agency, I met with a donor who told me one of her causes was child bullying. I then let her know about a new anti-bullying program we were running out of our children's services arm. She ended up funding it).

16. What's the best philanthropic decision you've ever made? Why? (This keys you into information about what type of impact your donor is hoping to have and how s/he evaluates opportunities).





17. Why do you give to our organization? (This helps you learn more about their values as well as their personal connection to what you do. Someone once told me she started giving because her parents supported us. Since she'd already told me her father had recently passed away, this gave me an opening to discuss a memorial gift in his honor).

18. Where do you feel the mission (or work) of our organization aligns with your values?

19. Which of our programs do you find most compelling? (This lets you draw out their particular areas of interest so you can better match your proposal to their passions, once that time arrives).





20. What do you think about our organization? (This gives your donor an opportunity to vent or gush. If they don't have a ready answer, sometimes I'll probe by asking them to describe the organization using three adjectives).

21. What do you think of our plans? (Appropriate when you've come to discuss a new campaign or project).

22. Who else should I be talking to? (Sometimes you'll learn they'd like to include a significant other or a trusted adviser).

23. What haven't I asked that I should? (Don't omit this question! Sometimes I've learned more here than from any other single question).



# Ascertaining Best Next Steps Questions

After you've given your prospect plenty of time to talk about themselves, it's now time to flip the tables and see what questions they'd like to have answered.

This helps you ascertain where your donor is along their journey with you – from awareness ... to interest ... to involvement ... to investment. Do they need more facts and figures? Do they need to meet someone else? Would they like to attend a tour or event? Or do they seem just about ready for an ask?

What you do next will depend upon how much more your donor needs to learn about your organization, your leaders and/or your campaign/project before you ask them to make a specific major gift.

## Questions to Help Your Donor Learn More

People always have questions. It's your job to draw these out so you can provide the information your donor needs to fully consider your request.

24. Are there any questions I can answer for you?

25. We'd like to keep you up-to-date. Is there a particular area of the organization/campaign/project we can highlight for you?

26. Is there anyone at the organization you'd like to meet?

27. Have you had the opportunity to read our strategic plan, or hear our vision for the future?



## Questions to Help Your Donor Trust You

People almost always have a concern or two. It's your job to draw these out so you can address any niggling doubts your donor may have. For someone to make a passionate major gift, they must trust you completely.

28. I hope you'd agree our mission is important and our work vital to [population served]. What are your impressions of our effectiveness?

29. I hope you'd agree our campaign/project is important and that success would mean a lot to [population served]. What are your impressions thus far?

30. I hope you enjoyed meeting [top executive]. What were your impressions of her?

31. Do you feel that your giving to our organization is making a difference?

32. When you talk to your friends about [org name], what do you tell them?



# Questions to Get Your Donor More Involved

It's nice to let your donor know you value them for more than just their money. This holds true whether or not they seem ready for a proposal at this point in time. While not everyone will want to get further involved in a hands-on activity, some will. And if this is the case, it is likely to deepen their investment with you over time.

33. How would you like to be involved in the coming year? Can I highlight a few ways others in the community have partnered with us?

34. Would you ever consider [volunteer opportunity]?

35. What has been meaningful to you about your involvement at [other org]?

36. What other thoughts do you have as to how you might you help us address these important issues?

An added benefit of asking these questions is you'll most likely find you're having a lot of fun. Your donor will have fun too!

The truth is most people enjoy chatting about their interests, passions and ways they can become involved. This brings meaning and purpose to their lives, and you've given them an opportunity to find this meaning by actively engaging with them and drawing them out.

Guess what? This tends to make them like you! And what better foundation is there for developing and sustaining a relationship?

Just make sure you listen, and enjoy.



# Ascertaining Readiness to Be Asked to Give

Never lose sight of your ultimate purpose. The reason you're on a "getting to know you" visit is to be able to better craft your proposal so your prospect is willing to take a look at it and give it some serious consideration.

But, how do you know if your prospect is at this point of readiness?

You ask!

Here are some examples:

**The "testing the waters" conversation.** Before we close today, I'd love to get your final take on this project we've discussed. We know it's ambitious, and... [We're seeking leaders to bring it to fruition... or... we've been humbled by the outpouring of community support thus far].

37. Would you agree it's the right thing at the right time?

38. Have you ever been involved in a project like this?

**The "idea" conversation.** You've been such a friend of the organization over the years. And I'm so glad we were able to meet and/or introduce you to [name] to talk a little more about our plans in the area of [what you discussed]. We'll keep you informed of our progress, but would also like to consider some ideas with you for how you might get more personally involved.

39. Can we come out to see you at your convenience next week to talk about it?

40. Is there anyone else you'd like to include in this meeting?



**The “straight shooter” conversation.** I’m delighted you were able to join us for this visit/tour. This is all happening thanks to leadership and philanthropy from members of this community. It would be wonderful to have your support as well.

41. Are you ready to talk about supporting this project?

42. Can I treat you for lunch in a week so I might share a proposal outlining what your involvement could look like?

If you get positive responses to any of the questions above, you’re done with cultivation and ready to jump to the end game – your solicitation!

**CAVEAT:** Always Be Prepared to Ask the Ultimate Question

**When opportunity knocks, open the door!** Sometimes the ‘end game’ can jump up and bite you in the butt. This happens when it becomes clear your prospect wants to be asked NOW. In fact, they expect to be asked now, because they assumed this was the real purpose of your visit.

If this happens, you need to be prepared to ask.

I’m dead serious here. If you blow this opportunity, you’ll destroy all your hard work up to this point.

# Real Life Example



I was on a donor visit with the board president and our brand new acting E.D. I'd set up the meeting before the new E.D. came on board, but she had made it clear to me that my role was to observe and provide factual information as needed; she would be in charge. We were meeting with a major donor who we were hoping would consider a \$200,000 gift and his philanthropic adviser (who I knew well from a previous job).

After we got through the preliminaries, the donor said "How do you want me to help?" The board president said something about how much his support had meant over the years. The donor said, "How much are you asking me for?" The acting E.D. said "Oh, we're not here to ask you today. We're just here to talk."

The philanthropic adviser said "If I know Claire, and I do, I'm sure she has an amount in mind."

The acting E.D. looked daggers at me, making it clear my job was to stay silent. Yet clearly the donor was signaling to us that we had his time, and ear, now – and it was up to us to make the most of it. I wanted to crawl into a hole and disappear. Instead I did what I could and turned it back over to the board president, asking her if she wanted to respond.

In the excitement of the moment she said (off the top of her head) "We were hoping you might consider \$1 million."



The donor actually laughed! It was so out of the ballpark of what he'd given previously, or what other donors were giving, that it really was simply a shot in the dark. And he was way too savvy for that.

The donor expected us to do our homework and present a considered proposal. The acting E.D. at this point told him we'd send him a proposal so he could consider this further and decide on the amount with which he was comfortable.

He told us he had another meeting to attend, and he'd think about it. Within a week, we received a check for \$5,000.

End of story.

When your prospect demonstrates they're ready, you need to be ready too! And here's your question:

**Would you consider making a gift of \$ \_\_\_\_\_ to this project?**



# Conclusion

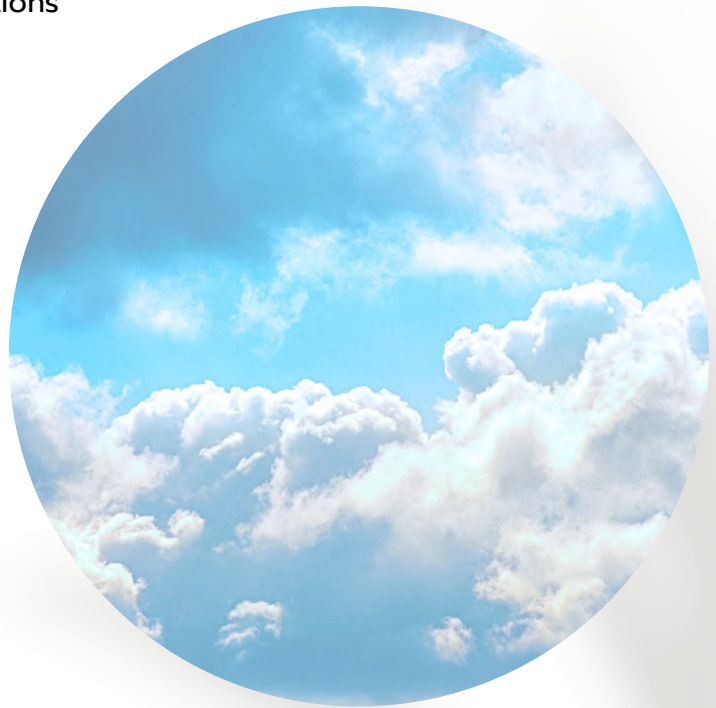
Think ahead about which of these 42 questions you'll ask your donors when you visit with them, and why.

Imagine what might prevent them from saying "yes" when you make your ultimate major gift fundraising offer, and ask questions with the intention of overcoming any hesitations or objections.

With every interaction, you should have an objective in mind.

To paraphrase Lewis Carroll in *Alice in Wonderland*: "It's only when you know where you're going that you're very likely to get there."

**To your success!**





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# About the author



**Claire Axelrad, J.D., CFRE**, is a fundraising visionary with 30 years of frontline development work helping organizations raise millions in support. Her award-winning blog showcases her practical approach, which earned her the AFP “Outstanding Fundraising Professional of the Year” award.

Claire, who teaches the CFRE course that certifies professional fundraisers, is a regular contributor to GuideStar, Nonprofit Pro, Network for Good and Maximize Social Business. Her passion is coaching nonprofits to address 21st century challenges and overcome barriers to sustainable funding.

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