

ASKING STRATEGIC QUESTIONS® **For Education and Libraries**

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 – New Information, Attitude and Values and Some Impact Questions

1. How did you come to choose (name)? (How did your child, grandchild come to choose (name)?)
2. What do you believe is the role of education (public education) in our society? How important is that to you?
3. What roles have libraries played in your life as a child, college student, and young adult? What roles do they play today? What role in the life your family, your children?
4. What were some of your best experiences as a student/member here? What is your child (grandchild) enjoying the most?
5. What impact did your education have on (your career choice) (the person you are today)?
6. How have libraries played a role in your career?
7. When were you last back to campus? What brought you? What were your impressions? When did you last visit a library (our library)? What were your impressions?
8. In what positive ways has the (name) influenced your life? (Influencing your child's life?)
9. Which faculty members or administrators made an impact on your life? (Is making an impact on your child's life?)
10. Can you share a time when a librarian had an impact on your life (you child's life)?
11. How do you feel about (name) today? What do you know about our current initiatives (expansion) (new programs) (campus life today)?
12. Why do you support (name)? Why have you supported (name) in the past?
13. I noticed you haven't supported (name) in a number of years, what changed for you?
14. How well do you know (latest innovative programs)? What are your impressions?
15. What do you believe are the perceptions of (name) in the community? Region? Nationally? Internationally?
16. What are your perceptions of our effectiveness in graduating students with strong values, ready, willing, and able to work effectively (attend the best high schools, attend the best colleges)?
17. We see libraries as a place that fosters community. What roles do you see libraries playing on campus?
18. What are your impressions of our vision for the future?
19. (for public institutions) With government cutbacks taking a steady toll, many public institutions are trying to expand private philanthropy. What are your thoughts (feelings) about that?
20. In what ways do you believe we have a strong case for philanthropic investment?
21. What inspired your recent gift to us?
22. What made your recent gift possible?

23. How do you feel about the philanthropic investments you make to us?
24. In what ways do you believe your investments in us are making a difference?
25. To what degree do you feel we use your investments wisely?
26. Whom do you know on our Foundation Board? (Governing Board) (Alumni Board) (Dean's Council) (Advisory Board)?
27. What is your impression of our (fill in which board)?
28. What is your sense of the Board's reputation within in the community (among our alumni, parents, membership)?
29. What are your impressions of our publications (communications) (social media presence) (website) (videos)?
30. What have you read/viewed/heard from us that you have enjoyed? (Found helpful? Found Informative?)
31. Have you attended any of our events? Which ones? How did that come about? What was your impression?
32. We were delighted you could make your last reunion (gala, read-a-thon). What was your impression?
33. Do you have any particular concerns you would like me to share with our (President), (Chancellor) (Board leadership) (Chief Librarian) (Dean)?
34. Do you feel you know our Dean and trust his/her leadership? How so?

Additional Planned Giving Questions for Current Donors

1. We so appreciate you including us in your estate plans. What aspects of our program inspired that decision?
2. As you think about the future of the (people we serve, our children, education in America, the role of libraries) what are some of your worries; what are your hopes? What role do you see our library (institution) playing in addressing those concerns (aspiration)?

His or Her Network -- New Information Questions

1. Who among your classmates (fellow parents, grandparents) are you still in touch?
2. How connected do you feel to your classmates (fellow parents)?
3. To what degree do you use social networking to connect with classmates (friends)?
4. How else do you stay connected?
5. (for public institutions) What relationships do you have with (the state senate) (the state assembly) (our US senators) (our US representatives)?
6. How might we better tap into your networks and connections?
7. Which social networking sites do you find the most useful, enjoyable?
8. How might we to a better job of using social media to connect with (young alumni) (alumni) (parents and grandparents) (our membership) (the educational institutions in our community)?
9. What is the best way to connect with you?

Additional Planned Giving Questions

1. Many of our donors, especially those who have been with us over the years, would like their children and grandchildren to be part of our philanthropic family. To what extent is that important to you?
2. How do you involve your children (grandchildren) in your philanthropic interests?
3. How might we help you engage your children (grandchildren) in our mission, vision, and work?
4. Are there others with whom we should meet, perhaps a financial planner or other members of your family who help you with your charitable giving? Who might they be? How might we do that?

Mission, Vision, Work and/or Project and/or Campaign Priority – Attitude, Values, and Impact Questions

1. What are your impressions of (our vision for the future) (our strategic plan) (our bold ideas) (our aspirations for our students, faculty, educational partners, or community)?
2. In what ways do you find our case for philanthropic investment strong and compelling? How would you make it more compelling?
3. As you consider our alumni (parents) (grandparents) (friends) (members), how might we position our (vision) (plan) (big ideas) so they would see the importance of their roles as stakeholders?
4. To what extent do you believe (i.e. the need for girls to learn math and science) (the need for affordable, public education) (the need for every young person to have access to information) (the need for every community to have access to a library of our stature) are serious problems (opportunities) for our (community, state, region, country, or world)?
5. In what ways do these (did these) issues affect you, your family, your neighbors, your beliefs, your values?
6. What impact do you believe achieving our vision will have on the university (school) (college) (library) (community, nation)?
7. So, what you'd like to see is...
8. As you (read, heard) our vision for the future, in what ways do you see our school (institution) (library) effectively addressing these issues?
9. Are there other ways our institution could help solve this problem?
10. In what ways might you help us address these issues?
11. What do you believe our (staff) (faculty) (Board) (closest friends) (alumni) (parents) (members) should do to help make this vision (these ideas) (this plan) a reality?
12. Are there any questions about our vision, mission, work, priorities that we've not answered?

Personal and Lifestyle – New Information and Values Questions

1. Our students have to juggle a lot. You must have your hands full with little ones, how do you juggle career and parenting?
2. 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?
3. Do you enjoy entertaining in your home? Do you entertain for business? Do you ever entertain for philanthropic groups? Tell me about that.
4. How's business? How is this economy affecting you? Your business?
5. How does the economy (your business situation) effect your philanthropic decisions?
6. 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?

Additional Planned Giving Questions

1. May I ask, what roles do your children (grandchildren) (financial planner) (lawyer) play in your philanthropic decision-making?
2. What issues do you weigh (did you weigh) when you are making decisions about your estate plans?

World View, Philanthropy and Giving Interests – New Information, Attitude, Values, and Impact Questions

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? What impact do you believe that investment could have on (our community, our nation, our world)?

5. If you could design the perfect project that would encapsulate and further your philanthropic goals, what would that be? From your point of view, why is that important?
6. What other organizations do you currently support? Volunteer for? Serve on the board of? What does your spouse support?
7. To what degree do you include your children in your philanthropic decision-making?
8. How have you taught philanthropy to your children (grandchildren)?
9. Which are your top three philanthropies and why? Is that true for your spouse as well? Which are his/her top three?
10. Where does (name) fit on your (your family's) list (if not among the top three)?
11. What are your expectations of the organizations in which you invest? Is that true for your spouse (your children)?
12. (for public institutions) As you think about the enterprise of public education in this country, (the role of libraries within a public institution) what do you think is its greatest contribution? To what degree do you believe that contribution is essential? Do you see our institution contributing in those ways? 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 saving and changing a life, improving the 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?
23. Is (name) part of your estate plans?
24. What role does the (President, Chancellor, Dean) play in your philanthropic decision-making? (What roles does the board play?) (Faculty play?)
25. How are decisions made at your family foundation? Who is involved? What is the process?
26. Under what circumstances do you make exceptions to your (giving guidelines, average amount)?
27. I noticed (organization) received an extraordinary gift from your foundation, what made their request so compelling?
28. 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?
29. I hope we have demonstrated to you the impact your investments have had. What stands out for you?

Engagement – New Information, Attitude, Values, Impact, and Commitment Questions

1. How do you like being involved with the organizations you support? What is most satisfying about that?
2. How can we get you more involved with (name)?
3. Would you be interested in helping us identify and engage others?
4. Would you be willing to review a class list? School list? Area list? Parent list? Member list?
5. When was the last time you visited the campus (the library)? What was your impression? Would you be interested in visiting?
6. What one piece of advice would you give us as we plan our future?
7. What one piece of advice would you give our students (our education partners) (our government leaders) (the children and families who use our services) as they consider their futures?
8. We would love you to (insert involvement request here), is that something you would find of interest?
9. 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?
10. We would love for your foundation board members to make a site visit, how can we make that happen?
11. Under what circumstances do members of the foundation board participate in (activity) of organizations with whom you have relationships?
12. We so appreciate (past involvement or advice). How do you feel about the experience?
13. To what degree have we maximized your expertise (connections)? How might we do better?
14. I hope we've demonstrated to you the impact your involvement has had. To what degree is that true? What stands out for you?

More 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 philanthropic decision you've ever made? What was the impact of that decision?
5. 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?
6. To what extent does our mission (vision, work) dovetail with your beliefs? How so?
7. If you could pass along a lesson to (your children) (grandchildren), (the people you help with your philanthropy) what would that be?
8. What do you expect from the charitable organizations in which you are involved? Is that different for (higher education) (public education) (libraries)? If so, how so? How well are those expectations met? Which organizations do this well? Tell me about that. Does your spouse feel the same? How well are we meeting your expectations?
9. How has our institution helped shape your values (had an impact on the values of your children, grandchildren)?
10. How have other organizations and institutions demonstrated to you the impact of your philanthropic investments?
11. How do you like organizations and institutions to demonstrate their appreciation for gifts you have made?
12. If we 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.

Testing the “Rights,” for Readiness and Commitment

1. I remember you saying visual literacy (technology, access to information) is important to you, is that right?
2. As you think about making a real difference for the students and faculty (members) of (name), what projects (priorities, programs, giving opportunities, or naming opportunities) have the greatest appeal?
3. We would like to come and speak with you, over the next few weeks (days, months), about making an investment in (name). Who should be a part of that conversation?
4. As you think about the (name) ambitious goals for the future, which of our priorities do you think should be the most important (will have the most important impact)? How would you rank the others?
5. As you know (the leadership annual fund program name) is a critical piece of (name) our commitment to (our students) (our membership) (our community), is that something with which you agree?
6. What do you need from us in order to consider putting us in your estate plans?
7. What has been your experience with (name) that led you to consider putting us in your estate plans?
8. Is there anything else we need to cover?
9. 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 institution 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 our students (on our faculty) (on our ability to achieve our vision)...
4. (Objection: “I pay taxes. I don’t see why you need to raise money.”) It sounds like we’ve not adequately demonstrated the role philanthropy plays in our institution. May I share some data with you that others have found compelling?
5. (Soft answer: “Let me think about it and I’ll get back to you.”) I can certainly understand that. May I ask what factors will you consider as you weigh our request?
6. (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 institution?”
7. (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. 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 914 428 7777 or send email to mail@theosbornegroup.com

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