

100 Questions

TO HELP YOU BUILD RELATIONSHIPS
THROUGH THE SIX I's OF FUNDRAISING...

To be effective, we must...build relationships:

The Six I's of Fundraising® is a human process by which we *build relationships*. The Six I's are useful for:

- Building relationships
- Building your fundraising program
- Building your major gifts culture

I. IDENTIFY – Is this person a major gift prospect for our nonprofit?

A. General Information:

1. 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?
5. How's business? How is the economy affecting you? Your business?
6. How does the economy (your business situation) affect your philanthropy?
7. How does the economy (your business situation) affect your philanthropic decisions?
8. What a beautiful piece of artwork, do you enjoy collecting?
9. How did you choose your life's work? Why did you choose this work?
10. What are the guiding principles that have helped you achieve success in your business life? (Personal life?) (Philanthropic life?) (Volunteer life?)
11. What is the best business / personal decision you have ever made? How so?
12. What is most important to you in your life / family / work / philanthropy?

B. Relationship to Our Nonprofit?

13. What do you believe our organization does best?
14. What are you most pleased with at our organization?
15. To what extent does our mission (vision, work) dovetail with your beliefs? How so?
16. 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?

C. "Prospect"? "Suspect"? How Does Our Nonprofit Compare?

17. What other organizations do you currently support? Volunteer for? Serve on the board of?

18. Which are your top three? Why is that?
19. Where is our organization on your list (if not among the top three)?
20. I noticed (organization) received an extraordinary gift from you (your foundation). What made their request so compelling?

II. INFORM – What does the prospect know about our nonprofit?

A. What does the prospect know about our nonprofit?

21. What do you know about our mission, vision, and work?
22. How do you feel about our mission, vision, and work?
23. How well do you know our programs? Which ones?
24. Which aspects of our programs do you believe are our greatest strengths?
25. What are your primary sources of information about our nonprofit?
26. What are your impressions of our publications? Which ones do you get, read, like?
27. Do you think you are 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?
28. How do you prefer to receive information?
29. What do you believe are the perceptions of our organization (nationally, in the region, state, community)?
30. What are your perceptions of our effectiveness?
31. Do you have any particular concerns you would like me to share with our CEO?
32. Do you know our CEO?
33. What are your impressions of our CEO? Why?
34. Who do you know on our board / faculty / staff?
35. Have you had an opportunity to meet with any of the people we serve? Under what circumstances? What were your impressions?

III. INTEREST – What are the prospect's primary interests/passions?

A. Prospect's primary interests/passions?

36. Why do you support us?
37. Why do you contribute to our organization?
38. In what ways do your personal interests impact your volunteer activities, philanthropic investments?
39. What is the most satisfying gift you have ever made to any nonprofit?
40. How do your gifts to our organization connect to your most important values?
41. What would you like to accomplish with your money that would be most meaningful to you?
42. What would you like to see happen to make your dream (or passion) possible?
43. How do you see yourself supporting this?
44. What else would you like to accomplish with your money that would be most meaningful to you?

45. When do you feel would be the most impactful time for you to make this gift?

B. *Connection to your nonprofit?*

46. Who do you perceive are our chief philanthropic competitors?

47. Have you attended any of our events? Which ones? How did that come about? What was your impression?

48. What would you most like to see our organization do more of?

IV. INVOLVE – How should this prospect be involved in our nonprofit?

A. *Is the prospect involved with your nonprofit?*

49. What do you expect from the charitable organizations in which you are involved?

50. 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?)

51. As you think about the most satisfying volunteer experience you've had, what was key?

52. How have you been involved with other organizations? What was that experience like?

53. How can we get you more involved with us?

54. Would you be interested in helping us identify and engage others?

55. What one piece of advice would you give us as we plan our future?

B. *Does involvement connect to the prospect's interests?*

56. Would you be willing to review a list of prospects?

57. Who among your friends and acquaintances might be moved by our work?

58. We would like for you to (insert involvement request here). Is that something you would find of interest?

59. How have other organizations demonstrated to you the impact of your giving?

60. How do you like organizations to demonstrate their appreciation for gifts you have made?

61. 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?

V. INVEST – What is the most likely investment by this prospect?

A. *Gifts to your nonprofit in the past?*

62. In what ways do you feel good about the gifts you make to us?

63. Do you believe your gifts to us make a difference? If so, how?

64. Do you feel we use your contributions wisely, that we are fiscally well managed?

65. What capital gifts have you given that have please you're the most? Why?

66. How did your gift come about? What made it so pleasing? Are you still involved with them?

67. Have you ever made a gift using a planned giving vehicle such as a bequest, trust, or gift annuity? How did that come about? Is that something that interests you? Do you believe you are knowledgeable about such vehicles? Would you like to know more?

B. Ready to make a new gift?

68. I remember you saying that (insert appropriate program, project, constituency) is important to you, is that correct?
69. As you think about making a real difference, what projects (priorities, giving opportunities, naming opportunities) have the greatest appeal?
70. 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?
71. What do you think should be the most important priority? How would you rank the others?
72. As you know (insert priority) is a critical piece of our commitment to the nation. Is that something with which you agree?
73. Are we a part of your estate plans?
74. 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?
75. Then, may I suggest a next step of ...?
76. What would it take for you to consider a major gift to our organization?
77. Under what circumstances would you be willing to make a stretch, capital gift to our organization?
78. When you give, do you give both annually, to capital projects, endowment?
79. Among our fundraising priorities, which do you find the most compelling? Why? Least compelling? Why?
80. What factors go into your philanthropic decisions?
81. In my household, my spouse and I make all of our giving decisions together. How does it work in your household?
82. How are decisions made at the foundation? Who is involved? What is the process?
83. Under what circumstances do you make exceptions to your (giving guidelines, average amount)?
84. If I could demonstrate to you the true impact of your philanthropy, would you prefer: something named for you or someone you love; 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.
85. Are you ready to move forward?

VI. INSPIRE – How do we inspire this prospect to make a lifetime gift to our nonprofit?

A. Does the prospect “own” our vision?

86. 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 to help us?

87. We would like you to make a site visit. How can we make that happen?
88. Under what circumstances do members of the foundation board participate in (activity) of organizations with whom you have relationships?

VII. FOLLOW UP QUESTIONS – To be used with any of the questions above

89. How so?
90. Can you clarify that?
91. Can you give me an example of what you mean?
92. Do you have any questions about what I just said?
93. What specific results are you looking for?
94. Can you say more about that? Did I understand you correctly when you said? Did I answer your question?
95. How did that come about?
96. What did that mean to you and your family?
97. How do you feel, what do you think, what do you believe about that?
98. How strongly do you feel about that?
99. What is most important to you?
100. Are we in agreement?

The best ask: Will you consider a gift of \$100,000 for our Student Program beginning in January impacting the lives of 50 deserving students?

Complimentary Handout

Boost Your Major Gifts I.Q.
(Webinar)



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