Workbook Excerpt

Fundraising Strategy Shortcuts

Cultivating and Closing Major Gifts
A Donor-Centric Approach to Fundraising

A donor-centric approach to fundraising means interacting with your prospects in a way that is appropriate to their level of potential and also sensitive to their level of interest and shared passion for your cause. Donors for whom a $500 gift is a “stretch” deserve as much, or more, appreciation and care as donors of $10,000 for whom such a gift is less personally costly. However in terms of spending your organization’s resources wisely — that is, being good stewards of your resources — it is important to recognize and acknowledge that donors with higher potential for major or transformative gifts require more personalized and expensive cultivation. It is simply a fact of good stewardship.

Depending on how you’ve segmented your donors and prospects, you will interact with them according to the level of resources and personalization you can afford as represented in Figure 1.

There are only a relative few prospects for whom you can afford to be very resource intensive as you are at the right end of the personalization continuum. Once you have identified those few you hope to cultivate with high touch or face-to-face, you will need individualized plans to interact with each one. We have included a Prospect Strategy Worksheet in the Toolkit on page 10 to assist your strategy development.

Some of the things you will need to plan for each prospect include touch points, getting an appointment, planning objectives for the visit and how and when to make a solicitation.

**Touch points**

Meaningful cultivation activities are an important part of your major gift effort. You will need to identify as many opportunities for informing, involving and engaging your supporters and potential supporters as possible. One way to identify these opportunities is to brainstorm a list of “touch points.” Touch points are all the different ways you can “touch” a prospect or donor throughout the year. The touch points appropriate to your organization may depend

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Figure 1: Level of Personalization, Resource Investment by Prospect
on the geographic scope of your organization, its facilities, its programs and other factors, so you will want to involve as many people in this brainstorming activity as you can. We have created a short list on the worksheet on page 9, but hope that by brainstorming this issue, you will come up with many more creative ways to reach prospects through the year.

Touch points should be built into cultivation plans for each prospect you are working with, as a means of making them feel like an “insider” and to establish a more personal relationship. After 6 to 8 touches from an individual at your organization, donors will feel they already “know” you. Obtaining a first face-to-face appointment or meeting will be that much easier and the first visit will be more relaxed and comfortable.

Getting an Appointment
There are primarily three ways to initiate the first face-to-face visit with individuals you have identified as potential major givers. You can send a letter, call them on the phone, or send an email. All three methods have advantages and disadvantages, summarized in Table 1, and your approach should be selected based on your knowledge of the individual.

For instance, with older individuals, it is often advisable to send a letter before calling, to identify yourself and establish your credibility as a representative of your organization. If your prospect is a busy executive, a quick and to-the-point email may be your best strategy. For many prospects, telephone is the best choice as it is interactive and allows you to establish rapport with your prospect. Your goal for any initial contact is to get a face-to-face meeting.

Before engaging your prospect in any way, it is wise to have at least three compelling, inviting reasons why you want to have a face-to-face meeting. For instance,

- To thank you for your past gift support
- To get your input on our programs
- To tell you about some of our newest initiatives and success stories
- To get your opinion on how we can more successfully educate/engage people in (your area) in our work.
- To deliver a thank you gift

<table>
<thead>
<tr>
<th>Method of Contact</th>
<th>Advantages</th>
<th>Disadvantages</th>
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<tbody>
<tr>
<td>Letter</td>
<td>✗ Sets up follow up phone call, establishes identity and credibility</td>
<td>✗ Formal, may cause them to avoid the call ✗ Must be followed with a call</td>
</tr>
<tr>
<td>Email</td>
<td>✗ More casual, quick and easy</td>
<td>✗ Easy to ignore, don’t know if it’s been received or read ✗ May be followed by a call</td>
</tr>
<tr>
<td>Phone Call</td>
<td>✗ Most personal, helps establish rapport, interactive</td>
<td>✗ May be perceived as telemarketing which has a negative connotation</td>
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</table>

Table 1: Methods for Getting an Appointment
If you have only one reason, it is easy for the prospect or donor to overcome that with an objection or deflection. Having three reasons is compelling and more difficult to dissuade.

Sample telephone, letter and email scripts are included in our toolkit on pages 18-23. In addition, common objections and suggestions for overcoming these objections are included on page 12.

Planning Objectives for Your Visit
Once you have the appointment, you need to be clear about your objectives for the visit and plan to meet those objectives.

Objectives:

- What do I know?
- What do I want to learn?
- What do I want to share?
- What outcomes do I want?
- What follow up will I build-in?

During a meeting with a prospect, try to uncover as much about the prospect’s interests and financial capability as possible. A list of open-ended questions that can be used to lead donors into values-revealing conversations is included in our toolkit on pages 14-15.

A sample Prospect Profile Form can be found on pages 16-17 of the toolkit. This form helps identify areas that will help the organization better understand and respond to the donor including information related to: family, employment, community affiliations, education, hobbies and interests, etc. These pieces of information help form a unified picture of the prospect and will enable the organization to be more donor-centric in its approach.

When and How to Make a Solicitation
Before asking your prospect for a substantial gift, there are a few questions you want to be sure are already answered:

- What is this donor’s interest or passion and where does it align with our mission?
- What is the project they will be most interested in funding?
- What is the correct ask amount for this donor? This should be in harmony with the project or need you are seeking funding for, as well as the donor’s capacity to give.
- Who should be involved in the solicitation? The president or CEO? A board member? A friend or colleague?
- Is this the right time to ask? Should we wait until after the recession is over? After their pledge to the church building fund is over? After their children are out of college?
- Who else may be involved in the decision to give? A spouse? Other family members? Financial or tax advisors?
- How does s/he want to be recognized for a gift? Knowing their stewardship desires before asking for the gift ensures you handle any gift negotiations appropriately, and also that you accomplish post-giving appreciation and recognition in the most meaningful way for the donor(s).
“Never think you need to apologize for asking someone to give to a worthy cause, any more than as though you were giving him or her an opportunity to participate in a high-grade investment. The duty of giving is as much his or hers as is the duty of asking yours.”

John D. Rockefeller, Jr

When you know the answers to these questions in advance, you will be making a solicitation it is hard to say “no” to. During your solicitation conversation, get your prospect to buy in to the organization, its leadership and vision, and to the specific impact the gift you are going to ask for can make. Get the prospect to say:

- **“Yes” to the organization:** “I remember you told me that you think our organization is at the forefront of where the needs in today’s world are. Is that right?”

- **“Yes” to the leadership:** “When we talked about our leadership, you didn’t really know much about Bill Smith, but you thought our vision of alleviating human need and suffering was on target. Now that you’ve had a chance to see some of Bill’s email alerts and updates, wouldn’t you agree he is a dynamic leader for our organization?”

- **“Yes” to the impact their gift can make:** “It’s amazing to me that our dollars can accomplish so much worldwide. When you think that a contribution of $10,000 can really impact the lives of so many by providing clean, renewable drinking water, it’s kind of humbling, isn’t it?”

When you have lead your prospect through an affirmation of the organization, the leadership and the impact their gift will make, it’s time to ask:

> “With everything we’ve talked about, I’m asking you to consider supporting ORGANIZATION with a gift/pledge of $_____.”

Once you have made the ask, be sure to let your prospect or donor be the next one to speak. The silence may be deafening, the atmosphere awkward or uncomfortable. But you cannot move the conversation forward, nor steer it in the appropriate direction, without some response or reaction from the prospect.

Your prospect can respond in several ways:
- Yes
- No
- Maybe

For substantial gifts, you will want to have a prepared gift proposal you can leave with your prospect or donor.
Overcoming Objections
Many “no” responses are either “not yet” or “you haven’t given me a compelling enough reason to want to give.” To overcome objections,

- **Acknowledge the objection:** “I understand”
- **Group with others:** “I’ve talked with several other people who have [repeat objection]
- **Give new reason:** “And when I’ve discussed with them that it is private funding that pays for our physical building and location, they have been very interested in hearing more about why the need is so great.”
- **Build in next steps:** “If you don’t mind my asking, have you been to see what we have accomplished thus far?”

Tracking Progress
Every personal visit, as well as many telephone, email and traditional mail contacts, should be recorded as contact reports for permanent entry into the database of the organization. A sample Contact Report form is included in our Toolkit on page 11. Recording contacts within the organization’s database is one of the most important responsibilities of a gift officer or relationship manager. This attention to detail helps the organization:

- Build a comprehensive view of their major prospects
- Keep the contact and demographic data concerning prospects up to date
- Maintain institutional memory after staff members resign or retire

Conclusion
Cultivating and soliciting major gifts is a process that can be learned, practiced and improved. Wherever your organization is in terms of its maturity in asking for major gifts, we hope this guide will be a valuable resource as you move to the next level. Please join the WealthEngine Institute for more education, more networking and more research.
Fundraising Strategy Toolkit
# Sample Touch Points Worksheet

<table>
<thead>
<tr>
<th>Possible Touch Points</th>
<th>Your Organization’s Touch Points</th>
</tr>
</thead>
<tbody>
<tr>
<td>Events</td>
<td></td>
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<tr>
<td>Meetings</td>
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<td>Tours</td>
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<td>Small gatherings at board member homes</td>
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<td>Breakfast with the President</td>
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<td>Thanksgiving card</td>
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<td>Birthday card</td>
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<td>Christmas/Holiday Card</td>
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<td>Year-end giving brochure</td>
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<td>Recent press releases via mail or email</td>
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<td>New Year appreciation letter</td>
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<td>Letter detailing or alerting to changes in tax code or legislation affecting charitable giving</td>
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<td>Anything having to do with identified hobbies – i.e., for horseback enthusiast, an article you saw concerning the international horse show, etc.</td>
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<td>Insider newsletter from the president</td>
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<tr>
<td>A sticky note on the organizations newsletter with a personal note</td>
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<tr>
<td>Surveys</td>
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<tr>
<td>Need your advice on a specific topic</td>
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<tr>
<td>Call to action – write your representatives on this issue</td>
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<tr>
<td>Shout-out in social media for personal or professional milestone</td>
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# Sample Prospect Strategy Worksheet

<table>
<thead>
<tr>
<th><strong>Non-Profit Organization Name:</strong></th>
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<table>
<thead>
<tr>
<th><strong>Name:</strong></th>
<th><strong>Date:</strong></th>
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<thead>
<tr>
<th><strong>Staff:</strong></th>
<th><strong>Phone:</strong></th>
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<thead>
<tr>
<th><strong>Philanthropic Decision Makers:</strong> (Prospect, spouse, other family members, financial advisors, etc.)</th>
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<table>
<thead>
<tr>
<th><strong>Right Amount:</strong> (ask amount)</th>
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<table>
<thead>
<tr>
<th><strong>Right Purpose:</strong> (area of interest)</th>
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<tr>
<th><strong>Right Solicitor:</strong> (Does CEO or board member need to be involved?)</th>
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<tr>
<th><strong>Right Time:</strong></th>
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<tr>
<th><strong>Obstacles to Overcome:</strong></th>
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<tr>
<th><strong>Long Term Goals:</strong></th>
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<table>
<thead>
<tr>
<th><strong>Short Term Goals:</strong></th>
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<table>
<thead>
<tr>
<th><strong>Donor’s Motivations/Issues:</strong></th>
<th><strong>What Don’t You Know?</strong></th>
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<table>
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<tr>
<th><strong>Decision Maker’s Motivations/Issues:</strong></th>
<th><strong>What Don’t You Know?</strong></th>
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<tr>
<th><strong>Activity:</strong></th>
<th><strong>By Whom:</strong></th>
<th><strong>By When:</strong></th>
<th><strong>Expected Results:</strong></th>
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<tbody>
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Confidential Contact Report Form

<table>
<thead>
<tr>
<th>Prospect Name:</th>
<th>ID:</th>
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<tbody>
<tr>
<td>Address:</td>
<td>Contact Date &amp; Location:</td>
</tr>
<tr>
<td>Contacted by:</td>
<td>Type of Contact: (Phone, face-to-face, event, etc.)</td>
</tr>
</tbody>
</table>

Prospect Status:

Indicate Action If a New Prospect
- [ ] Assign to me
- [ ] Assign to Prospect Pool
- [ ] Assign to Stewardship Pool
- [ ] Remove from Prospect Pool totally

Stage of Cultivation:
- [ ] Identification
- [ ] Discovery
- [ ] Cultivation
- [ ] Solicitation
- [ ] Stewardship
- [ ] Inactive

Suggested Ask Amount:
- [ ] Over $25,000
- [ ] $25,000
- [ ] $20,000
- [ ] $15,000
- [ ] $10,000
- [ ] $5,000
- [ ] $2,500

Biographical Updates:

Prospect:  
Spouse:  

Notes:

Summarize the Contact Including All Substantive Information:
Overcoming Common Objections

When you reach someone on the telephone for the purpose of setting a personal meeting, you will often be faced with objections. It’s important to be prepared for objections and to be persistent in attempting to obtain an in-person meeting. Even if you do not achieve your immediate goal of obtaining a meeting, always try to leave an open door to that possibility in the future.

**How did you select me as someone to meet with?**

You’re one of our best supporters and we’re trying to see people who have supported us to say thank you and get your opinions about what we’re doing.

**I don’t think I want a personal visit – can we do it over the phone?**

Part of what we’re trying to do is meet you in person so you’ll have a personal contact here. But we also have a short survey – it doesn’t take more than 15 minutes – but it was designed to do face-to-face. Don’t worry – it’s not high pressure and I promise I won’t be asking for money. I just want to provide you with information and get your feedback on the work we’re doing.

**Is this about money?**

I promise I’m not coming to ask for money. I just want to provide you with information and get your feedback on the work we’re doing. Ultimately, my job is about raising money for Organization, but right now, we’re just asking our current donors – people like you – to tell us what we’re doing well and where we can improve, so we’ll be able to ask others to become supporters, as well.

**Why do you want to see me? I know I couldn’t be your biggest donor.**

You’ve been a faithful supporter, and all our donors are important. Whatever you can tell us about what we’re doing right and what we need to improve will be helpful.

**I think you’re doing a great job – I don’t have much to tell you about what to improve.**

You’d be surprised how valuable your feedback will be to us. We just need the opportunity to sit down and ask you the right questions.

**I can’t make a large gift.**

I understand that, and this is not about money at all. I’m not asking for money – I just want to give you some information, and get your opinions about what we’re doing.
Overcoming Common Objections (Continued)

I’m really busy for the next few weeks (months)

Well, this doesn’t need to take long. I’d love to take you to lunch or dinner, but if it works better, I could just stop by your office for twenty minutes or so. Would that work?

(If no,) I understand this is a bad time; would it be possible for us to make an appointment in ____?

(If no,) I understand. Would it be okay if I call you in six months or so?

I don’t know what I’ll be doing then, call me when you’re in the area and we’ll see if it works out.

I’m really looking forward to meeting you and I hate to leave it to chance. It would be great if we could set a tentative time, and I’ll give you all my contact information so if something comes up, you can call me and we can change it. Would that be okay?

You’re not coming just to see me, are you?

I certainly would come to see you if you were our only supporter in the area, but we try to be good stewards of our travel budget, and there are a number of people in your area that I’ll be seeing that week.

What exactly is your purpose in wanting to see me?

It’s simply this: we want to talk with the people who have been our best supporters so we can learn how to become better at attracting new supporters, and better at working with our current donors so they’ll want to keep supporting us. We’re growing, and we’re doing more and more good things in the world, and we want to make sure that as we grow, we grow our base of support at the same time. We can’t do that without talking to people like you. I promise I won’t be asking for money on this visit.
Strategic Questions for Engaging Donors and Prospects in Values Based Conversations

These questions are related to the prospect's perceptions of your Organization

- How did you first hear about *Organization*?
- How much do you know about the work we do?
- Do you have any questions about our mission, vision or the work we do that I could answer?
- What are your overall impressions of *Organization*?
- What do you think of our web site, publications, and communications?
- How do you get information about us? (email, newsletter, etc.)
- Do you know any of our staff or board members?
- Do you believe our leadership is taking the organization in the right direction?
- Do you have any concerns or comments you’d like me to share with our leadership?
- Do you know any others who support *Organization*?
- What do you think the perception of *Organization* is in your community?
- How do you think we could let people in your community know about the work we’re doing?
- Are there ways you could help us with that?
- Do you feel the work *Organization* is doing is meeting a need in your community or the world community?
- Is there anything else you think we could or should be doing to further our mission?
- Is there a need or a particular area with a need that you feel is currently unmet?

These questions may come from observations in the home or office

- Do you have children? Grandchildren? Try to obtain names, ages, occupations, schools attended, where they live, etc.
- Do you get to travel much? Where to? What is your dream vacation?
- Do you enjoy entertaining? Do you entertain for business? Have you ever entertained for philanthropic purposes? Tell me about that.
- How’s business?
- Is the current economy helping (hurting) business?
- I love your artwork. Where did you get this?
Strategic Questions for Engaging Donors and Prospects in Values Based Conversations (Continued)

These questions concern other charitable interests

- Are there other organizations you support?
- Do you serve on charitable boards?
- Are you an active volunteer for any organizations?
- Do you and your spouse make giving decisions jointly, or do you each make your own giving decisions?
- How are you involved with other organizations you support?
- How can we get you more involved with Organization?
- Would you be interested in helping us identify, educate and engage others?
- What do you expect from charitable organizations you contribute to?
- How have other organizations demonstrated to you the impact of your giving?
- If we could demonstrate to you our appreciation for your philanthropy, would you prefer
  - Something named for you or someone you love?
  - Meeting some of the people you’ve helped?
  - Hearing from some of the people you’ve helped?
  - Receiving a report on how your money has been spent?
  - Or something else?

These are values-based lifestyle questions

- Do you belong to a faith community? How are you involved?
- Did you learn philanthropy from your family?
- How and why did you choose your life’s work?
- What do you attribute your business success to?
- Do you have some overarching principles that have guided you in business or in life?
- What achievements are you most proud of?
- What do you hope to do in retirement?
- How does our mission intersect with or complement your beliefs?
## Sample Prospect Profile Form

### Organizational:
- **Prospect Name:**
- **ID#:**
- **Affiliation to Org:** Donor, friend, volunteer, staff, etc.
- **Interest Area (If Known):** Area of philanthropic interest or interests

### Biographical:
- **Home Address:**
  - Address:
  - Phone:
  - Email:
- **Business Address:**
  - Address:
  - Phone:
  - Email:
- **Giving Summary:**
  - Last gift date:
  - Current giving range:
  - Current giving club (if applicable):
- **Interests and Hobbies:**
- **Birthdate:**
- **Education:**
  - Name of college, program, degree, etc.
- **Family:**
  - Spouse:
  - Children: (#, ages, names)
  - Other:
- **Community Affiliations:**
  - Organizational affiliations, friends, civic interests, boards, honors and awards
- **Charitable Contributions:**
  - Known contributions to other organizations (recipient organization)
### Sample Prospect Profile Form (Continued)

**Financial:**

- **Earnings Estimate:**
- **Real Estate Holdings:**
- **Publicly Recorded Stock Holdings:**
- **Other Assets:** Boats, planes, business interests, etc.
- **Capacity Rating:** Estimate of largest gift possible over five years
- **Assignment:** Name of prospect manager assigned to prospect
- **Contact History:** Date & type of contact (visits, phone calls, events)
- **Stage:** Identification, Discovery, Cultivation, Solicitation, Stewardship
- **Expected Solicitation Amount:** The amount you will ask for this solicitation cycle
- **Notes & Comments:**

Confidential Report: The information contained in this profile has been compiled from relevant public and internal sources and is believed to be accurate and current as of the date indicated. This document is not intended for distribution and is highly confidential.
Sample Telephone, Letter & Email Scripts

Sample telephone script for getting the appointment

“Hi. This is Name. I’m with Organization. Do you have a moment to talk?

I’m calling for a couple of reasons. First, I want to thank you for your support of Organization. We really appreciate all of our supporters. We were able to increase the number of individuals served by 15% last year, because of the generous donations of people like you.

Secondly, I want to find out if you’d be open to seeing me in person when I’m in City next. I’d like to share some information with you about Organization, and also get your impressions about how we’re doing.

Would you be able to meet with me next week, on Tuesday or Wednesday?

If no, “Would another week work better?”

“If still no, “May I check back with you in 6 months?”

Sample email script for getting the appointment

From: Sally Smith
To: Jennifer Leland
Subject: Greetings from Sally at Organization

Dear Ms. Leland,

I am with Organization, and travel frequently to meet with our supporters. I’ll be in your area next Tuesday and Wednesday, and would love to get an opportunity to meet you. I can let you know about some of the exciting new initiatives we are implementing this year, and also some that are under consideration. We’d love to get your impressions. If you’re free for lunch either day, I’d love to treat you. If not, it need not take long, a half-hour to 45 minutes should do it. Please let me know if one of those days works, or if another time would be better.

Thanks in advance,

Name, Title, Organization, Address Phone Number
Sample Telephone, Letter & Email Scripts (Continued)

Sample letter script for getting the appointment

Mrs. Jane Doe
102 Main Blvd.
Williamsburg, VA 23185

Dear Mrs. Doe,

I’m writing to introduce myself. I understand you are acquainted with John Brown, one of our trustees. John works tirelessly for organization, and is very committed to our mission of saving the environment. John suggested I get in touch with you, as he believes you share his passion for the natural world.

Part of my job entails meeting with our friends and supporters, to share how our efforts are having an impact on some specific environmental challenges. We are also seeking community feedback on our current initiatives, as well as some focus changes being considered for the coming year.

I would love to have the opportunity to take you to lunch, or meet with you at your home or office, next week. I am available for lunch on Tuesday the 22nd or Thursday the 24th, if either of those dates works with your schedule. If not, I am free Tuesday, Wednesday or Friday afternoon, for a short appointment – I think a half hour to 45 minutes would be sufficient.

I will call you in the next day or two to make the arrangements. In the meantime, please feel free to call me at the number below if I can answer any questions. I look forward to speaking with you soon.

Yours truly,

Sally Smith
Director of Major Gifts
(333) 999-1122
Sample letter and questionnaire for getting the appointment

Mrs. Jane Doe
102 Main Blvd.
Williamsburg, VA 23185

Dear Mrs. Doe,

I’m writing to you because your giving history shows you care about Organization and believe it’s important to invest in our mission of providing high quality health care to the working poor. For this reason, we need your input and advice.

One of the greatest challenges facing Organization is to increase our current level of private support. With increased unemployment and shrinking wages, coupled with more restrictions on access to traditional health care, there is more need for our services than ever before. We are facing this critical demand at a time when many supporters have had to reduce or delay contributions.

It is clear that if we are to continue to serve the community in this time of need, we must to enhance our fundraising capacity. You can help us shape the future direction of our fundraising efforts by participating in a short donor survey. It will guide us to:

- Better engage and involve supporters and potential supporters
- Understand who gives, and why; as well as who doesn’t give, and why not, and
- Target our fundraising efforts towards the people who want to give and who have the ability to give

I’ll call you in a few days to see if we can find a convenient time to meet. It won’t take more than an hour of your time, and your input will be invaluable as we explore new and creative ways to meet the healthcare needs of the vulnerable members of our community.

Thank you for your support of Organization. I look forward to speaking with you and hope we have an opportunity to meet soon.

Yours truly,

Jerry Connelly
Director of Development
Sample questionnaire

**General**

<table>
<thead>
<tr>
<th>Question</th>
<th>Response</th>
</tr>
</thead>
<tbody>
<tr>
<td>What do you see as organization’s strengths?</td>
<td></td>
</tr>
<tr>
<td>How do you feel about the current direction organization is taking?</td>
<td></td>
</tr>
<tr>
<td>How do you feel about the leadership of organization?</td>
<td></td>
</tr>
<tr>
<td>Are there any concerns or comments you would like me to share with our leadership?</td>
<td></td>
</tr>
</tbody>
</table>

**Participation**

<table>
<thead>
<tr>
<th>Question</th>
<th>Options</th>
</tr>
</thead>
<tbody>
<tr>
<td>When were you last in the facility?</td>
<td></td>
</tr>
<tr>
<td>For what purpose?</td>
<td></td>
</tr>
<tr>
<td>What were your impressions?</td>
<td></td>
</tr>
<tr>
<td>Would you be interested in attending any of the following activities? (Select all that apply):</td>
<td></td>
</tr>
<tr>
<td>□ Tour</td>
<td></td>
</tr>
<tr>
<td>□ Educational opportunity</td>
<td></td>
</tr>
<tr>
<td>□ Volunteer training</td>
<td></td>
</tr>
<tr>
<td>How would you like to be involved with organization? (Select all that apply):</td>
<td></td>
</tr>
<tr>
<td>□ Volunteer on a committee?</td>
<td></td>
</tr>
<tr>
<td>□ Help with special events?</td>
<td></td>
</tr>
<tr>
<td>□ Write letters to potential supporters?</td>
<td></td>
</tr>
<tr>
<td>□ Identify potential supporters? (Review a list of names?)</td>
<td></td>
</tr>
</tbody>
</table>
Sample questionnaire (Continued)

<table>
<thead>
<tr>
<th>Philanthropy</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Why do you support organization?</strong> (Select all that apply):</td>
<td></td>
</tr>
<tr>
<td>□ I believe in the mission</td>
<td>□ It &quot;feels&quot; good</td>
</tr>
<tr>
<td>□ I trust the leadership</td>
<td>□ Family value/tradition</td>
</tr>
<tr>
<td>Comments:</td>
<td></td>
</tr>
<tr>
<td><strong>Why do you NOT support organization?</strong> (Select all that apply):</td>
<td></td>
</tr>
<tr>
<td>□ No one has asked</td>
<td>□ I didn't know there was a need</td>
</tr>
<tr>
<td>Other/Comments:</td>
<td></td>
</tr>
<tr>
<td><strong>Do we steward your gifts wisely?</strong> (Select all that apply):</td>
<td></td>
</tr>
<tr>
<td>□ You believe we use your gifts wisely</td>
<td>□ You believe your gifts make a difference</td>
</tr>
<tr>
<td>How could we improve?:</td>
<td></td>
</tr>
<tr>
<td><strong>How would you like us to demonstrate the impact of your philanthropy?</strong> (Select all that apply):</td>
<td></td>
</tr>
<tr>
<td>□ Something named for you?</td>
<td>□ Meeting the people you've helped?</td>
</tr>
<tr>
<td>□ Becoming part of a &quot;club&quot; or &quot;society&quot;?</td>
<td></td>
</tr>
<tr>
<td>Comments/Other</td>
<td></td>
</tr>
<tr>
<td><strong>Are you aware and knowledgeable about planned gift vehicles?</strong> (Select all that apply):</td>
<td></td>
</tr>
<tr>
<td>□ Have you considered making a gift to organization in your estate plans?</td>
<td>□ Would you like additional information?</td>
</tr>
<tr>
<td><strong>What organizations do you support in addition to organization?</strong></td>
<td></td>
</tr>
</tbody>
</table>
### Sample questionnaires (Continued)

#### Communication

In the past year, have we communicated:

- [ ] Too often
- [ ] Too little
- [ ] Right amount

Of the following communications you receive, how much do you value it?:

On a scale of 1 (I hate it) to 5 (I love it). Circle “0” if you are neutral, and leave it blank if you don’t receive this or don’t know if you receive it.

<table>
<thead>
<tr>
<th>Communication</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>0</th>
</tr>
</thead>
<tbody>
<tr>
<td>Magazine</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>0</td>
</tr>
<tr>
<td>Newsletter</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>0</td>
</tr>
<tr>
<td>Annual Fund Solicitation Letters</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>0</td>
</tr>
<tr>
<td>Telethon Calls</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>0</td>
</tr>
</tbody>
</table>

How can we communicate more effectively? (Select all that apply):

- [ ] Newsletters
- [ ] Letter
- [ ] Telephone Updates
- [ ] Social Networking Sites
- [ ] Email Updates
- [ ] Personal Visits
- [ ] Events
- [ ] Other