



Qualifying Planned and Major Gift Donors in One Easy Visit

National Capital Gift Planning Council Planned Giving Days Conference

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10:45 a.m. – 11:45 a.m.

*Melanie J. Norton, CFRE, MBA,
Founder and Philanthropic Consultant*

NORTON || Philanthropic Counsel

Disclaimer

Individual results may vary. Prospects may cause nausea, vomiting, headache, dizziness and shortness of breath.

Be sure to notify your supervisor if you experience sadness, loss of interest or feelings of worthlessness. Avoid driving hazardous machinery and drinking alcohol, even though you may want to. Conducting an interview while eating may cause indigestion and heartburn. If you have an interview that lasts more than four hours, you will feel the need to seek medical attention immediately.

Constantly in Search of the CIA!



Connection

Interest

Ability!

Tools in the Tool Chest

How do we gather information on connection, interest and ability?

- Data mining/research
- Response to mailings
- Web/internet inquiries
- Personal referrals
- Face-to-face visits
- Events
- Other?



Tools in the Tool Chest

- *All of the tools in the tool chest are important, so how do we gather the really valuable information not found through other means?*
- *Or, how do we engage a prospect or donor once we've hit a wall?*



The Structured Interview



A structured, face-to-face interview process designed to uncover the prospect's connection to, interest in, and ability to give to your organization.

The Structured Interview

A Valuable Tool in Your Tool Chest!



Yields personal data on a prospect's:

- History with your organization
- Perceptions of your organization today
- Motivations for giving

The Structured Interview

A Valuable Tool in Your Tool Chest!

*Potential for a major gift
to your organization...
today or in the future!*



The Structured Interview – My Experience

- Refined during my tenure at DePauw University
- Institution started to utilize in the early 1990s
 - Provided critical information on constituents leading into the largest capital campaign ever conducted by a private, liberal arts college at that time.
 - Primary tool for qualifying major gift prospects used by all development officers
 - Series of approximately 50 carefully considered questions covering a variety of topics and given in an agreed upon timeframe of approximately 75 minutes

The Structured Interview – My Experience

- Conducted an estimated 3000 interviews as an institution since introducing this discovery method
- Answers are confidential and shared only with high-level administration
- Article titled *Means, Motive and Opportunity* by Stephen K. Gauly online through the CASE website (www.CASE.org)
- Initial exposure for me through a Pentera conference

Why a Pre-Arranged Interview?

- Provides a great way to get to know the prospect
- Prevents the prospect from driving the agenda
- Remember to ask the important questions
- Avoids tangents



Why a Pre-Arranged Interview?

- A letter from your President or CEO will increase the odds of getting in the door and elevate the importance of the visit
- The answers to many of the questions in a structured interview will provide invaluable marketing information, especially in terms of your organizational message and its retention



The SI Allows You To...



- Find out if the prospect is philanthropic
- Test the potential gift size
- Determine areas or programs of interest
- Obtain enough collateral information to construct a cultivation plan OR determine further cultivation is not necessary

The Structure



It is important to come up with questions that make sense for your organization or cause!

Section 1

Divided into five primary subsets of questions

- 1) General information and understanding of your organization

GOAL: determine organizational knowledge, attitudes and interest level (20-25 questions)

Section 1

- Should contain open-ended questions to get the prospect talking about your organization and his or her experiences with you
- You want to find out how well the prospect knows your organization and determine general and specific attitudes relevant to your organization
- You are warming up the prospect to the interview process and getting a read on “hot buttons”

Section 1

- How did you first become acquainted with the organization?
(choose to attend the university, etc.)
- Describe your current relationship with the organization
(institution, university, etc.)
- How well do you feel you know the organization today?

Section 1

- Tell me about your best experience (as a volunteer, donor, student, etc.) and rate it on a scale from 1 to 4, with 4 being the best.
- Who at the organization made a particular impact on you?

Section 1

Other topics include:

- Support of mission (i.e. liberal arts)
- Strengths/weaknesses
- Reputation and attitude of alumni
- Peer institutions and rank in relation
- Recommend to a grandchild, child or other student?



Section 1

Other topics include:

- Most important issues – current and future – and recommendations
- Sources of information
- Current interest level



Section 2

Five primary subsets of questions

2) Giving Experience

GOAL: determine philanthropic interest and history
(5-7 questions)

Section 2

- Start by telling the prospect you want to review his or her involvement with your organization over the past five years
- Your objectives include determining how the prospect feels he or she has been treated with regard to volunteer efforts and annual support
- You also want to determine what types of causes your prospect tends to support

Section 2

- Have you contributed to our annual campaign?
(You should know the answer, so this can be rephrased as an opportunity to acknowledge their gifts)
- If so, what convinced you to make the gift?
- Are your gifts acknowledged in a timely manner?

Section 2



Other topics include:

- Reaction to recognition clubs
- Case for support (inquiry about motivation for giving)
- Support of other nonprofit or charitable organizations, and type

Section 3

Five primary subsets of questions

3) Special/capital support of the organization

GOAL: determine current capital gift potential and likely gift objectives (5-7 questions)

Section 3

- This section contains the big gift potential questions you want to ask
- Start this section by clarifying the difference between annual and capital/major gifts
- Draw out the responses to these questions if the answer is “yes”
- Be quiet and listen after the big question

Section 3

- Have you made a gift or commitment toward a capital purpose to any organization in the past five years? (If so, describe your giving experience)
- Where does our organization rank among your philanthropic causes?
- What is your impression of our need for capital support?

Section 3

- What do you believe are the principle factors in motivating a substantial gift to a charitable organization?
- Please rank, in order, the three areas which you believe require increased support at our organization.

(Hand interviewee a list of areas for philanthropic support)

Section 3

And the BIG MONEY QUESTION...



Section 3

- Would you consider making a major gift – say \$100,000 or more – to our organization in the next five years?
- If no, ever?
- If you were to make such a gift, what purpose holds the most interest for you today?

Section 3



- In considering fellow alumni and friends, do you know of other individuals who would have a particular interest in providing financial support to our organization?
(Preface as a confidential question)

Section 4

Five primary subsets of questions

4) Legacy/planned support of the organization

GOAL: determine deferred gift potential (5-7 questions)

Section 4

- Introduce this section by defining legacy or planned gift support at your organization
- Inform your prospect that it is a common expression of appreciation for supporters to remember your institution in their estate plans or through other types of planned gifts

Section 4

- Does the organization communicate with you about planned gifts?
- Do you read the planned giving newsletter? (alumni 55 and older)
- Is our organization already included in your estate plan?
- Have you reviewed your estate plan in the past five years?

Section 5

Five primary subsets of questions

5) Final Section

GOAL: determine organizational knowledge, attitudes and interest level (7-10 questions)

Section 5

- Bring the conversation back around from a very personal level to less invasive questions
- Include interest in volunteer activities only if you or someone else will follow up
- Ask for the prospect's advice as plans for the future are considered
- End with a light question

Section 5

- What can be done to enhance the relationship between the (volunteers, supporters, alumni, etc.) and our organization?
- Have you attended any of our events in the past five years? (what, feedback)
- Have you participated in a volunteer position?

Section 5

- Is there one piece of advice you would give our organization as we consider plans for the future?
- How would you complete this sentence: “When I think of [organization], I always think of _____.”
- Are there any questions you expected me to ask that I didn’t cover?

Remember...



- Set up your expectations for the interview in advance
- Respect the interviewee's time
- Listen and clarify there are no wrong answers
- Take copious notes
- Don't skip a question because you think you know the answer
- Brush up on your interviewing skills

Remember...

- *Don't forget to thank the prospect and follow up on promised information!*
- Be sure to capture important information in the database and for future strategy and cultivation



Resources

[http://www.case.org/Publications_and_Products/
CURRENTS/CURRENTS_Archive/1999/September_
1999/Means_Motive_and_Opportunity.html](http://www.case.org/Publications_and_Products/CURRENTS/CURRENTS_Archive/1999/September_1999/Means_Motive_and_Opportunity.html)

Questions?



Melanie J. Norton, CFRE, MBA
Founder and Philanthropic Consultant
Norton Philanthropic Counsel
melanie@nortoncounsel.com
317.730.6540
www.nortoncounsel.com

Thank you!

