

# SOCRATIC FUNDRAISING OVERVIEW



# Where are we going? The Challenge

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- Ask for permission to ask
- Make the ask



Make the story cycle ask



[1] Identity → Challenge  
“You have *[describe connection with donor’s identity]*”

[2] Victory → Identity  
“You understand *[describe how victory would be meaningful to donor]*”

[3] Challenge → Victory  
“Would you consider a gift of \$\_\_\_\_\_ to *[describe promised victory]*?”

Then, be silent

[1] “You have been a friend of this library for over twenty years.”

[2] “You understand how a new regional history collection would preserve our shared heritage.”

**Challenge**

[1] ↗

↘ [3]

**Identity ← Victory**

[2]

**The story cycle ask**

[3] “Would you consider a gift of \$50,000 to lead the campaign to make this a reality?”

[4] *Be silent*



[1] “You have done so much to improve care for others since your own diagnosis with breast cancer.”

[2] “You understand how lives could be changed by offering free early screening.”

**Challenge**

[1] ↗

↘ [3]

**Identity ← Victory**

[2]

**The story cycle ask**

[3] “Would you consider a gift of \$100,000 to help fund next year’s screening clinics?”

[4] *Be silent*

[1] “You have always had such a heart for supporting the arts in this community.”

[2] “You understand how this new exhibition could make a real impact for art lovers and the whole city.”

**Challenge**

[1] ↗

↘ [3]

**Identity ← Victory**

[2]

**The story cycle ask**

[3] “Would you consider a gift of \$50,000 as our lead campaign donor to make this happen?”

[4] *Be silent*

[1] “You have been such a loyal alumnus of this department since you graduated years ago.”

[2] “You understand how important scholarships are in giving students the chance for an education.”

**Challenge**

[1] ↗

↘ [3]

**Identity ← Victory**

[2]

**The story cycle ask**

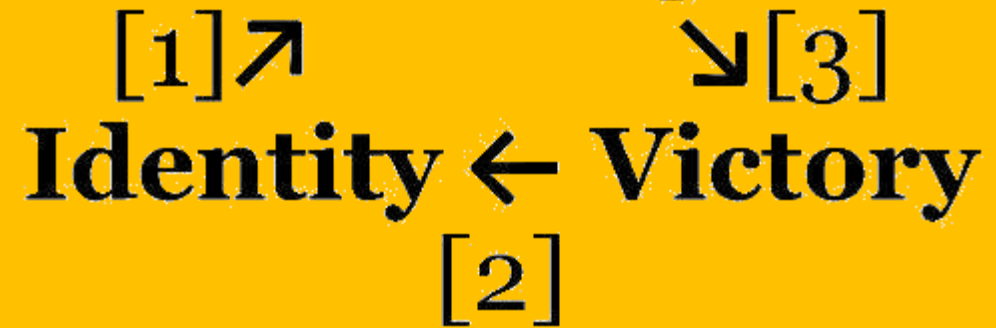
[3] “Would you consider a gift of \$100,000 to fund a permanent named scholarship to help others like you become proud alums in the future?”

[4] *Be silent*

# The story cycle fundraising ask



## Challenge



### [1] **Identity** → **Challenge** sentence

You have changed so many lives through your support of our job training programs, just as your mother liked to say, 'Giving people a hand up, not a handout.'

### [2] **Victory** → **Identity** sentence

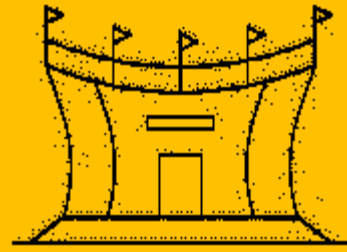
"You understand how this new technology center could provide real opportunities for young people who start out with nothing but a willingness to work hard, just like you did."

### [3] **Challenge** → **Victory** sentence

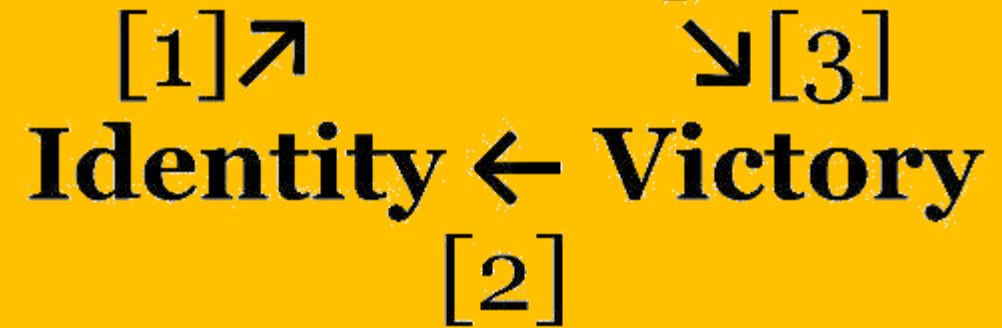
"Would you consider a gift of \$100,000 as one of our leadership-level donors to help transform our community in this way"



# The story cycle fundraising ask



## Challenge



[1] **Identity** → **Challenge** sentence

“You have meant so much to this football program since your days as a player over thirty years ago.”

[2] **Victory** → **Identity** sentence

“You understand how this new stadium expansion would launch our program onto the national stage.”

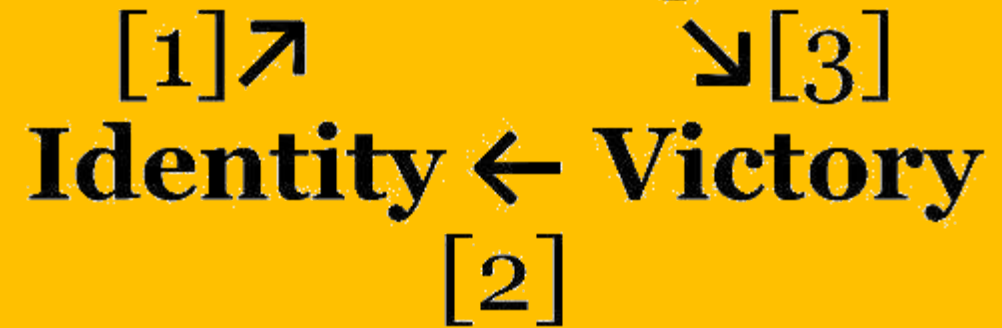
[3] **Challenge** → **Victory** sentence

“Would you consider a gift of \$2 million to lead the campaign to make this a reality?”

# The story cycle fundraising ask



## Challenge



[1] **Identity** → **Challenge** sentence

“You have been so dedicated to improving the lives of patients at this hospital going back even before your own father received care here.”

[2] **Victory** → **Identity** sentence

“You understand how this new “Campaign against Cancer” can change the lives of so many right here in our community.”

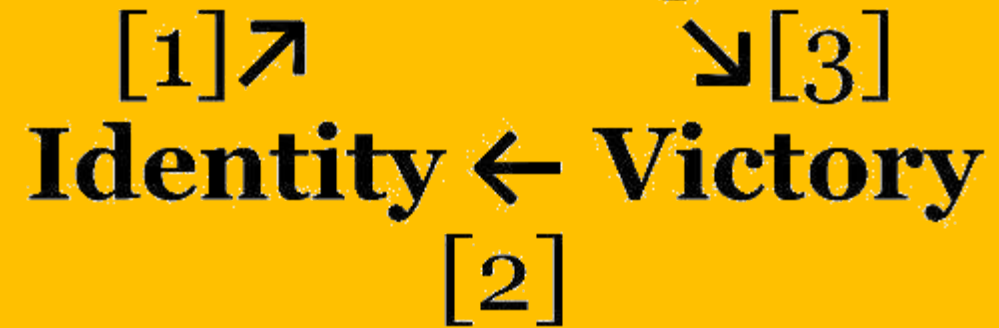
[3] **Challenge** → **Victory** sentence

“Would you consider a gift of \$100,000 to help fund next year’s screening clinics?”

# The story cycle fundraising ask



## Challenge



[1] **Identity** → **Challenge** sentence

“You have been well-known in this community as an advocate for our youth summer camps.”

[2] **Victory** → **Identity** sentence

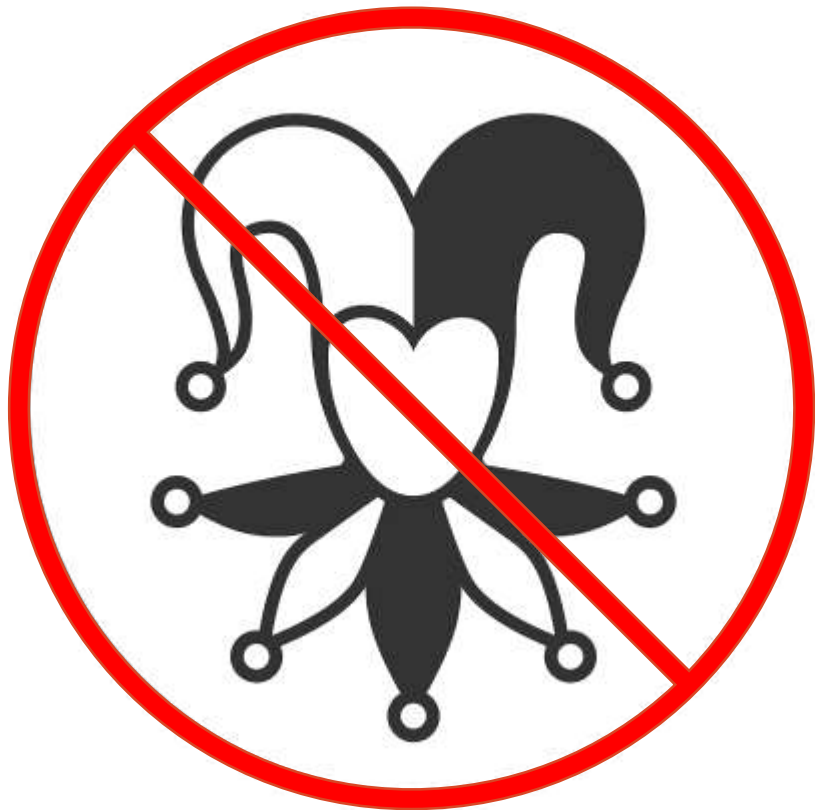
“You understand how camp scholarships can change the lives of young people, giving them a chance to learn and grow, just as you did in your youth.”

[3] **Challenge** → **Victory** sentence

“Would you consider a gift of \$50,000 to create the Smith Family Permanent Endowed Scholarship Fund to give that opportunity to future generations of campers?”

Foolproof

**Challenge**  
[1] ↗      ↘ [3]  
**Identity ← Victory**  
[2]



You can't make the story cycle ask without the full story

- Don't know how the donor's story or values connect to the challenge?  
**Step 1 can't happen**
- Ask doesn't promise a specific impact?  
**Step 3 can't happen**
- Don't know why the gift's impact would be meaningful for the donor?  
**Step 2 is impossible**



# Imagine a donor. Build your own ask. Share and discuss.

[1] "You have been a friend of this library for over twenty years." **Identity → Challenge**. [2] "You understand how a new regional history collection would preserve our shared heritage." **Victory → Identity**. [3] "Would you consider a gift of \$50,000 to lead the campaign to make this a reality?" **Challenge → Victory**.

[1] "You have done so much to improve care for others since your own diagnosis with breast cancer." **Identity → Challenge**. [2] "You understand more than anyone how lives can be changed by offering free early screening." **Victory → Identity**. [3] "Would you consider a gift of \$100,000 to help fund next year's screening clinics?" **Challenge → Victory**.

[1] "You have always had such a heart for supporting the arts in our community." **Identity → Challenge**. [2] "You understand how this new exhibition could make a real impact for other art lovers like you and our whole city." **Victory → Identity**. [3] "Would you consider a gift of \$50,000 as our lead campaign donor to make this happen?" **Challenge → Victory**.

[1] "You have been such a loyal alumnus of this department since you graduated years ago." **Identity → Challenge**. [2] "You understand how important scholarships are in helping others like you become proud alums of the future." **Victory → Identity**. [3] "Would you consider a gift of \$100,000 to fund a permanent named scholarship giving students the chance for an education?" **Challenge → Victory**.

# The ask meeting

**Challenge**



**Identity ← Victory**

- The fundraising ask shouldn't be just a “naked” challenge
- It should be part of the full story cycle.

# The ask meeting: Review



Describe and confirm the donor's identity connections:

- Identity → Challenge
- Victory → Identity

# The ask meeting: Case for support



Connect Challenge → Victory.

May use a formal proposal document.

Answer:

- Why is the project needed? [*Justify Victory*]
- Why now? [*Justify Making Challenge*]
- How exactly will it work? [*Describe Challenge → Victory*]
- What's it going to cost? [*Describe Challenge*]



“Would you be open to exploring ideas to ...”  
“Would you be interested to hear more about how you could ...”

Buderus, A. A. & Smith, G. P. (October 2013). Blended gift, eh? Making the most of this emerging workhorse for major and planned gift officers. National Conference on Planned Giving, Minneapolis, MN, p.9.

**Challenge**

Identity ← Victory

“Would you like to hear about some possible ways to ...”

Brovey, A. P. & Roenigk, P. L. (October 25, 2008). How old are you and did you know you could... Initiating planned gift discussions and getting answers to key questions. National Conference on Planned Giving, Denver, CO, p. 12.

**Ask for permission to ask:  
Share options**

“We would like to show you some ways that you can ... Would you be open to hearing some of these ideas?”

Buderus, A. A. & Smith, G. P. (October 2013). Blended gift, eh? Making the most of this emerging workhorse for major and planned gift officers. National Conference on Planned Giving, Minneapolis, MN, p. 9.

“My job is to put together personalized options for you to consider. Would you mind if we set a time to look over some of those ideas together?”

“What if it was possible to make a gift and still [address financial objection]? Would you like to hear about these options?”

Brovey, A. P. & Roenigk, P. L. (October 25, 2008). How old are you and did you know you could.... Initiating planned gift discussions and getting answers to key questions. National Conference on Planned Giving, Denver, CO, p. 9

**Challenge**

Identity ← Victory

“If we could show you a way to ... would that be of interest?”

Buderus, A. A. & Smith, G. P. (October 2013). Blended gift, eh? Making the most of this emerging workhorse for major and planned gift officers. National Conference on Planned Giving, Minneapolis, MN, p. 9.

**Ask for permission to ask:  
Address problems**

Brovey, A. P. & Roenigk, P. L. (October 25, 2008). How old are you and did you know you could.... Initiating planned gift discussions and getting answers to key questions. National Conference on Planned Giving, Denver, CO, p. 11

“There are simple ways to ... Would you like to know more about those?”

Comfort, J. & Lumpkin, S. (October 2017). How to have the MOST productive conversations: From here to eternity... [Paper presentation]. National Conference on Philanthropic Planning, Baltimore, MD, p. 7.

“Can I tell you about a gift option that would ...”

A

“Others in your situation have ... Would you like to hear more about how this works?”

B

You remind me of another donor. Do you mind if I share her story? She was able to ... Is that something that might be useful for you?”

**Challenge**

Identity ← Victory

**Ask for permission to ask:**  
**Others like you have found**

C

“Some of the people I meet with are interested in hearing about ways to .... Is that something that might interest you?”

D

“Others who share your feelings have established perpetual funds here as a way of giving back to ‘dear old State.’ Would you like to hear more about setting up such a fund, perhaps in honor or memory of a beloved family member?”

Brovey, A. P. & Roenigk, P. L. (October 25, 2008). How old are you and did you know you could.... Initiating planned gift discussions and getting answers to key questions. National Conference on Planned Giving, Denver, CO, p. 7



# Spot solutions: Preparing the ask



What peers should be present at the solicitation?

Are there giving instruments that match?

- Scholarships
- Endowments
- Virtual endowments
- Charitable trusts
- Memorial gifts
- Estate gifts
- Other instruments



# Real-world practice

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- Theory concepts match the questions that successful fundraisers ask
- Next are two hundred examples!
- Questions become powerful when they're part of the full story cycle

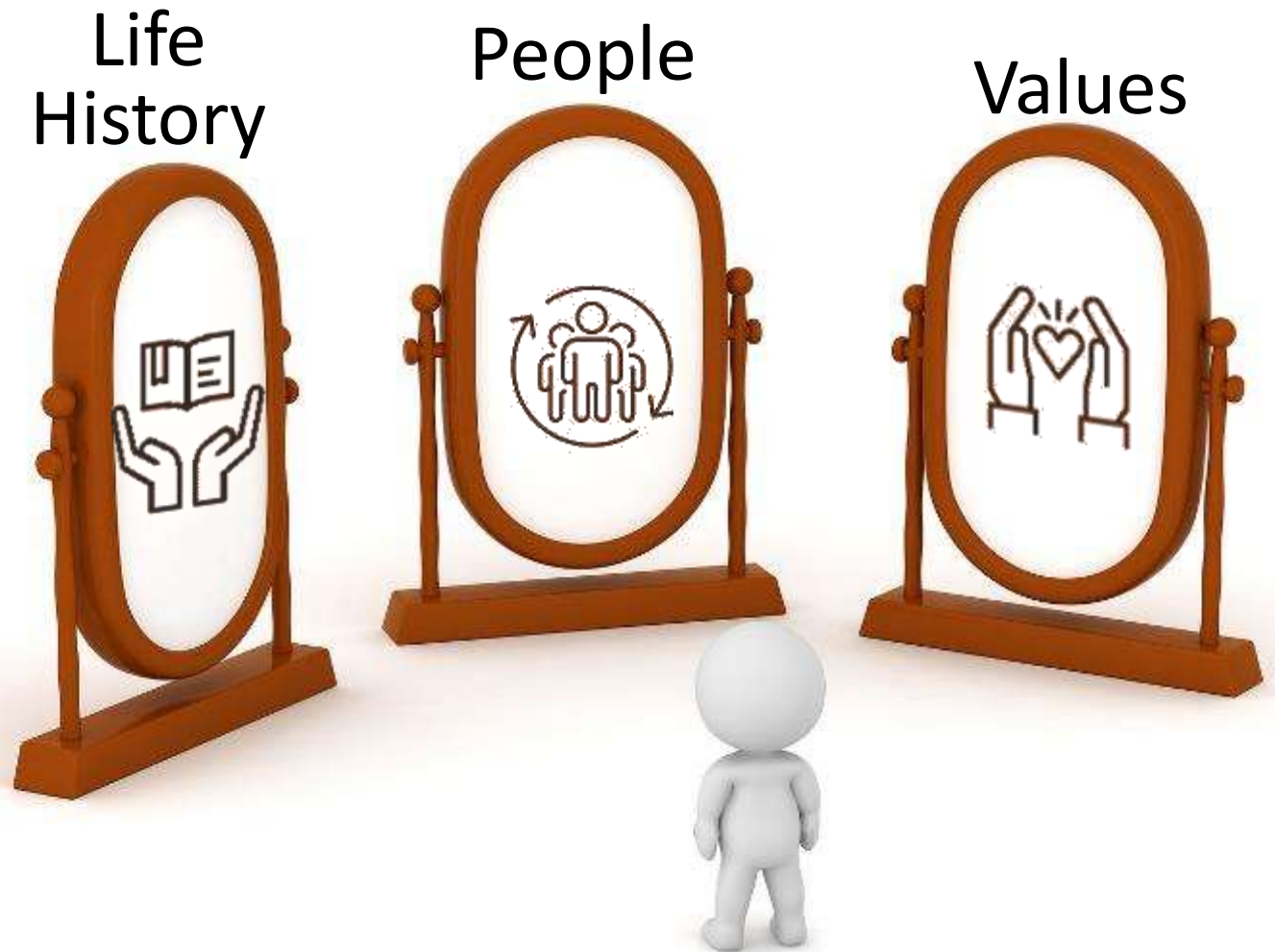


# Part I: Identity

Examples of opening questions to connect the donor's original identity  
**(History, People, Values)**

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with the charity, the  
cause, or philanthropy



A

“When did you first get interested in [this cause]?”

Levine, J. & Selik, L. A. (2016). Compelling conversations for fundraisers: Talk your way to success with donors and funders. Chimayo Press. p. 15

B

“Would you mind telling me how you became connected to the organization?”

Sheffield, C. (October 2020). Discovery: How to learn about a donor’s assets. [Presentation]. Emerging Philanthropy Conference, Pittsburgh, PA [online].



**Life History:**  
*Cause or charity  
origin story*

Swank, K. (October 2009). What women want: Understanding the needs and objectives of women’s philanthropic giving, including planned gifts. [Paper presentation]. National Conference on Philanthropic Planning, National Harbor, MD. p. 9

C

“How did you first find out about us?”

Fredricks, L (2006). The ask: How to ask any purpose. John Wiley & Sons. p. 14.

D

“What first brought your attention to our organization?”



“How did you first get involved with the organization?”

Kihlstedt, A. (2009). *Capital campaigns: Strategies that work*. Sudbury, MA: Jones and Bartlett Publishers. p. 61

“How did you get connected to this organization?”

Kihlstedt, A. (2013). *Asking styles: Harness your personal fundraising power*. CharityChannel Press. p. 22.



**Life History:**  
*Cause or charity  
origin story*

Wilson, T. C. (2008). *Winning gifts: Make your donors feel like winners*. John Wiley & Sons. p. 115 (“get involved”); Klein, K. (2009). *Reliable fundraising in unreliable times: What good causes need to know to survive and thrive*. Jossey-Bass, p. 32 (“come to be involved”)

Can you tell me what brought you to [this charity] in the first place?”

“How did you get [or come to be] involved with our organization?”

Levine, J. & Selik, L. A. (2016). *Compelling conversations for fundraisers: Talk your way to success with donors and funders*. Chimayo Press. p. 40.



“How did you decide to first start supporting ABC Charity?”

“What first made you interested in supporting this hospital?”

Comfort, J. & Lumpkin, S. (October, 2017). How to Have the MOST Productive Conversations: From Here to Eternity... [Paper presentation]. National Conference on Philanthropic Planning, Baltimore, MD. p. 6.



Janey, S. (October 2012). Start with their dreams: Let major and planned giving techniques follow. [Paper presentation]. National Conference on Planned Giving, New Orleans, LA. p. 6.

Fridman, N. (2021, May 26). Why now is the perfect time to have a conversation about values, giving and your family's legacy [PowerPoint slides]. Life and Legacy Annual Gathering, online. p. 18.

“What got you started as a donor to this organization?”

“What led you to make your first gift to the organization?”

**Life History:**  
*Cause or charity  
origin story*

Kihlstedt, A. (2013). Asking styles: Harness your personal fundraising power. CharityChannel Press. p. 22

A

“Where did you learn to give?”

Stroman, M. K. (2014). Asking about asking: Mastering the art of conversational fundraising (2nd ed.). CharityChannel Press. p. 148

B

“How did you learn to be generous?”

Stroman, M. K. (2014). Asking about asking: Mastering the art of conversational fundraising (2nd ed.). CharityChannel Press. p. 148

Challenge



Identity ← Victory

Life History:  
*Philanthropy  
origin story*

Fredricks, L. (2006). The ask: How to ask anyone for any amount for any purpose. John Wiley & Sons. p. 6

C

“What is your first memory of an act of generosity?”

Begun, M. S., & Rosandich, S. (October 2009). Retreats, circles, squares & blogs: donor collaborations that work. [Paper presentation]. National Conference on Philanthropic Planning, National Harbor, MD. p. 3.

D

“What is your first memory of when you knew it was important to give back and help those people or organizations in need?”

“What are your best memories of your time at ABC Charity?”

Comfort, J. & Lumpkin, S. (October, 2017). How to Have the MOST Productive Conversations: From Here to Eternity... [Paper presentation]. National Conference on Philanthropic Planning, Baltimore, MD. p. 5.

Challenge

Identity ← Victory

“What experiences were most meaningful to you during your time as a student?”

Wood, K. (May 7, 2020). Personal communication. Kris Wood, Senior Director of Development, College of Arts & Sciences, Texas Tech University.

“What were your favorite moments as a student.”

Fendrich-Turner, K. (September 9, 2020). Personal communication. Katy Fendrich-Turner, Director of Gift Planning, University of Texas - Austin.

**Life History:**  
*School or camp  
origin story*

“What’s your favorite place on campus?”

Sagrestano, B. M. & Wahlers, R. E. (2016). Getting started in charitable gift planning: The resource book. Charity Channel Press. p. 90



“What was the best thing about your experience at our school?”

Melvin, A. (2018, October). The ties that bind: Effective cultivation techniques. [Paper presentation]. Charitable Gift Planning Conference. Las Vegas, NV. p. 5

Challenge



Identity ← Victory

“Did you participate in any activities while a student?”

Sagrestano, B. M. & Wahlers, R. E. (2016). Getting started in charitable gift planning: The resource book. CharityChannel Press. p. 90

“Tell me about your favorite faculty member.”

**Life History:**  
*School or camp  
origin story*

Sagrestano, B. M. & Wahlers, R. E. (2016). Getting started in charitable gift planning: The resource book. CharityChannel Press. p. 90

“Tell me about your journey since you graduated from the university.”

“Tell me about your journey since you were first diagnosed.”

Vidmar, T. (May 1, 2020). Personal communication. Tony Vidmar, VP University Advancement and Public Affairs, Midwestern State University.



**Life History:**  
*Post-origin story  
journey*

“Tell me about your journey since you first became involved in [this cause].”



A

“How has [this cause or charity] been important in your life?”

See James, R. N., III. (2016). Phrasing the charitable bequest inquiry. VOLUNTAS: International Journal of Voluntary and Nonprofit Organizations, 27(2), 998-1011.

B

“Tell me your ABC Charity story.”

Comfort, J. & Lumpkin, S. (October 2017). How to Have the MOST Productive Conversations: From Here to Eternity... [Paper presentation]. National Conference on Philanthropic Planning, Baltimore, MD. p. 6.

C

How has [this cause or charity] impacted your life?”

Comfort, J. & Lumpkin, S. (October 2017). How to Have the MOST Productive Conversations: From Here to Eternity... [Paper presentation]. National Conference on Philanthropic Planning, Baltimore, MD. p. 6.

D

“How has the organization’s work affected you personally?”



“What have been your past experiences with the organization?”

Swank, K. (October 2009). What women want: Understanding the needs and objectives of women's philanthropic giving, including planned gifts. National Conference on Philanthropic Planning, National Harbor, MD. p. 9

Challenge

Identity ← Victory

“If you were to tell others about your care at the hospital, how would you describe it?”

Sagrestano, B. M. & Wahlers, R. E. (2016). Getting started in charitable gift planning: The resource book. CharityChannel Press. p. 90

“What have been your most positive experiences at our charity?”

**Life History:**  
*Cause or charity  
life history  
review*

Fridman, N. (2021, May 26). Why now is the perfect time to have a conversation about values, giving and your family's legacy [PowerPoint slides]. Life and Legacy Annual Gathering, online. p. 18.

“What is the most meaningful experience you had through your involvement?”

Sagrestano, B. M. & Wahlers, R. E. (2016). Getting started in charitable gift planning: The resource book. CharityChannel Press. p. 89



# Let's get practical!

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Practices and role-playing from Socratic Fundraising overview



# What's your favorite type of question to connect "my life history" identity with a challenge?

**A. Cause or charity origin story** "When did you first get interested in [this cause]?" "How did you first find out about us?" "How did you get connected to this organization?" "Can you tell me what brought you to [this charity] in the first place?" "How did you decide to first start supporting ABC Charity?" "What got you started as a donor to this organization?"

**B. Philanthropy origin story** "Where did you learn to give?" "How did you learn to be generous?" "What is your first memory of when you knew it was important to give back and help those people or organizations in need?" "What is your first memory of an act of generosity?"

**C. Post-origin story journey** "Tell me about your journey since you graduated from the university." "Tell me about your journey since you were first diagnosed." "Tell me about your journey since you first became involved in [this cause]."

**D. Cause or charity life history review** "How has [this cause or charity] been important in your life?" "Tell me your ABC Charity story." "How has [this cause or charity] impacted your life?" "How has the organization's work affected you personally?" "What have been your past experiences with the organization?"



# “My life history” identity connection question: Take a moment to construct your own example

**A. Cause or charity origin story** “When did you first get interested in [this cause]?” “How did you first find out about us?” “How did you get connected to this organization?” “Can you tell me what brought you to [this charity] in the first place?” “How did you decide to first start supporting ABC Charity?” “What got you started as a donor to this organization?”

**B. Philanthropy origin story** “Where did you learn to give?” “How did you learn to be generous?” “What is your first memory of when you knew it was important to give back and help those people or organizations in need?” “What is your first memory of an act of generosity?”

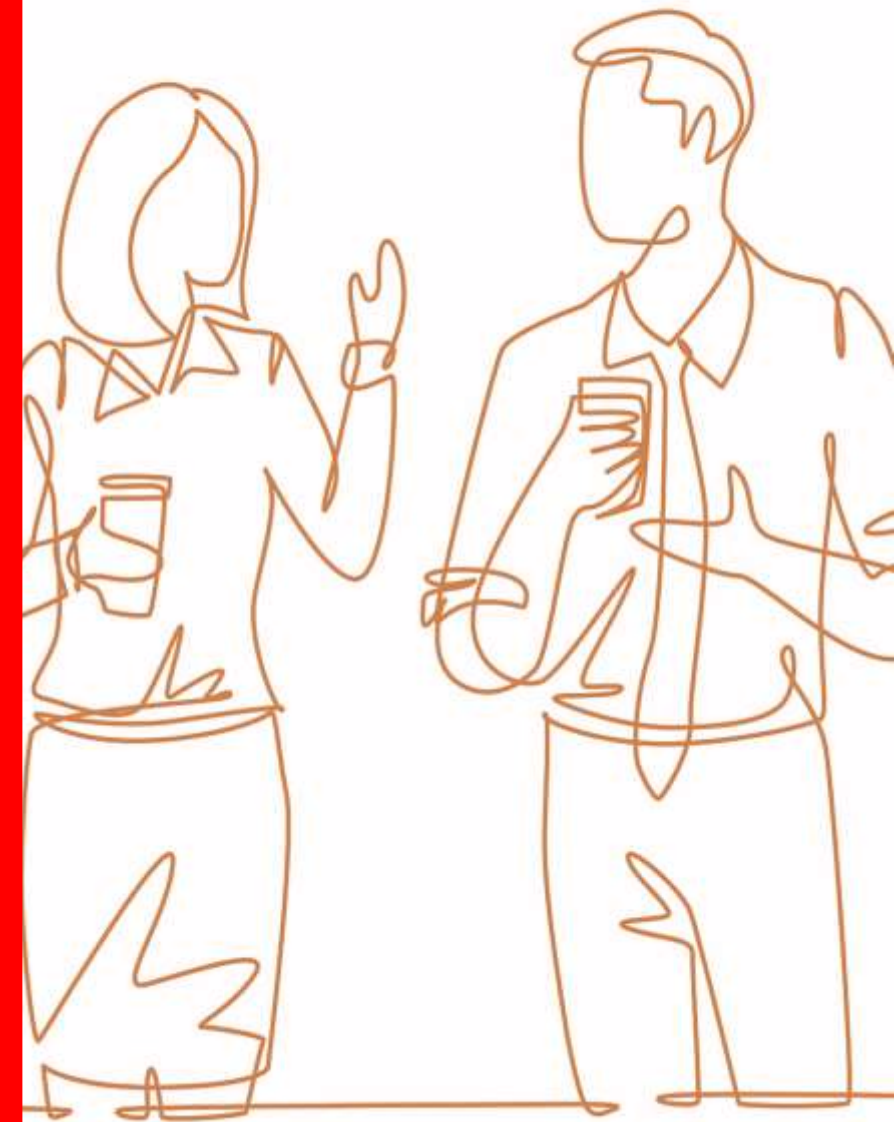
**C. Post-origin story journey** “Tell me about your journey since you graduated from the university.” “Tell me about your journey since you were first diagnosed.” “Tell me about your journey since you first became involved in [this cause].”

**D. Cause or charity life history review** “How has [this cause or charity] been important in your life?” “Tell me your ABC Charity story.” “How has [this cause or charity] impacted your life?” “How has the organization’s work affected you personally?” “What have been your past experiences with the organization?”



# “My life history” identity connection

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- Work with another person. Choose who will ask.
- Ask them your “My life history” identity question.
- Listen to their answer.
- Ask at least one follow up question.
- As they are answering, try to think of a giving “challenge” that might be particularly attractive to them. If you do, ask “Would you be interested to hear more about how you could ...?”
- Afterwards, discuss the experience from both perspectives. Any ideas? alternatives?

A

“Have others in your life been affected by [this cause]?”

B

“Is there anyone in your family who also cared about [this cause]?”



C

“How has [this charity] impacted your family or loved ones?”

D

“Have any of your family members or close friends been involved with our charity?”

Sagrestano, B. M. & Wahlers, R. E. (2016). Getting started in charitable gift planning: The resource book. CharityChannel Press. p. 89

Comfort, J. & Lumpkin, S. (October 2017). How to have the MOST productive conversations: From here to eternity... [Paper presentation]. National Conference on Philanthropic Planning, Baltimore, MD. p. 6.

Is your giving your decision or do you decide together with someone else? What is their connection to [this charity or cause]?"

See similar concept in Fredricks, L. (2001). Developing major gifts: Turning small donors into big contributors. Aspen Publishers, Inc. p. 58.



"Do you have a favorite doctor or staff person at the hospital?"

Sagrestano, B. M. & Wahlers, R. E. (2016). Getting started in charitable gift planning: The resource book. CharityChannel Press. p. 90

"Do you know any of our leaders, board/committee members, staff, volunteers, or other supporters?"

Fredricks, L. (2001). Developing major gifts: Turning small donors into big contributors. Aspen Publishers, Inc. p. 59.



A

“Did your parents or other family members support any charitable causes?”

B

“Can you tell me a bit more about who taught you to be generous or where your generous spirit comes from?”



Green, F., Wagg, H. & Field, C. (2019). You can't take it with you: The art and science of legacy fundraising. Independently published. p. 106

Eskin, J. (2019). 10 Simple Fundraising Lessons: A common sense guide to overcoming your fear of asking for gifts. Eskin Fundraising Training, LLC. p. 39

**People: *Philanthropy people connections***

C

“When you were young, was there anyone whom you considered a role model for giving?”

D

“Who are your philanthropic role models?”

Steenhuysen, J. (October 2012). Philanthropy planning: What to say and do in the room with your donors/clients to explore and document their philanthropy mission. [National Conference on Philanthropic Planning, New Orleans, LA. p. 7.

“What inspires you to give?”

“What inspired you to make this gift?”

Cadogan, E. & Skinner, K. (October 2016). Transformational blended gifts: Shifting the organizational culture. National Conference on Philanthropic Planning, Dallas, TX, p. 9



Brovey, A. (2019). Zen and the art of fundraising: The pillars in practice. CharityChannel Press. p. 10

“What inspired your first gift?”

Muir, R. (March 18, 2016). 21 discovery questions to ask now. [Blog]. <https://www.rachelmuir.com/blog/2016/03/18/21-discovery-questions-to-ask-now>



A

B

“Broadly speaking, what is your rationale for charitable giving?”



Steenhuysen, J. (October 2012). Philanthropy planning: What to say and do in the room with your donors/clients to explore and document their philanthropy mission. [Paper presentation]. National Conference on Philanthropic Planning, New Orleans, LA. p.9.

Ahem, T., & Joyaux, S. P. (2011). Keep your donors: The guide to better communications & stronger relationships. John Wiley & Sons. p. 147

“What inspired you to create your donor advised fund / private family foundation?”

“How does your giving reflect your values, your feelings, and your aspirations?”

Sharkey, G. (March 25, 2021). Personal communication. Greg Sharkey, Senior Philanthropy Advisor, The Nature Conservancy.

C

D

“Tell me about a few other causes you support: why do you support them?”

Melvin, A. (2018, October). The ties that bind: Effective cultivation techniques. [Paper presentation]. Charitable Gift Planning Conference. Las Vegas, NV. p. 5



“Would you mind telling me about the causes that are most important to you?”

Muir, R. (November 17, 2015). 21 discovery questions to ask now. [blog]. <https://trust.guidestar.org/blog/2015/11/17/21-discovery-questions-to-ask-now/>

Melvin, A. (2018, October). The ties that bind: Effective cultivation techniques. [Paper presentation]. Charitable Gift Planning Conference. Las Vegas, NV. p. 4.

“Do you typically give to the same nonprofits each year?”

Sheffield, C. R. (August 14, 2019). Discovery: How to learn about a donor's assets. [Webinar slides]. <https://www.stelter.com/Documents/pdf/webinars/Stelter%20Discovery%20August-2019.pdf>

“Why do you support them?”

“Where else do you give, and why?”

“Where does [this charity] fit in your overall philanthropic priorities?”

Ahem, T., & Joyaux, S. P. (2011). Keep your donors: The guide to better communications & stronger relationships. John Wiley & Sons. p. 262.



Comfort, J. & Lumpkin, S. (October 2017). How to Have the MOST Productive Conversations: From Here to Eternity... [Paper presentation]. National Conference on Philanthropic Planning, Baltimore, MD. p. 6.

“Where does our charity fall on your list of charitable priorities?”

**Values:**  
*Giving causes*

B. M. & Wahlers, R. E. (2016). Getting started in charitable gift planning: The resource book. CharityChannel Press. p. 90



A

“What do you think are the most important factors to donors who make a major gift to our institution?”

Melvin, A. (2018, October). The ties that bind: Effective cultivation techniques. [Paper presentation]. Charitable Gift Planning Conference. Las Vegas, NV. p. 5

B

“What is the single most important reason that you believe someone would support the project?”

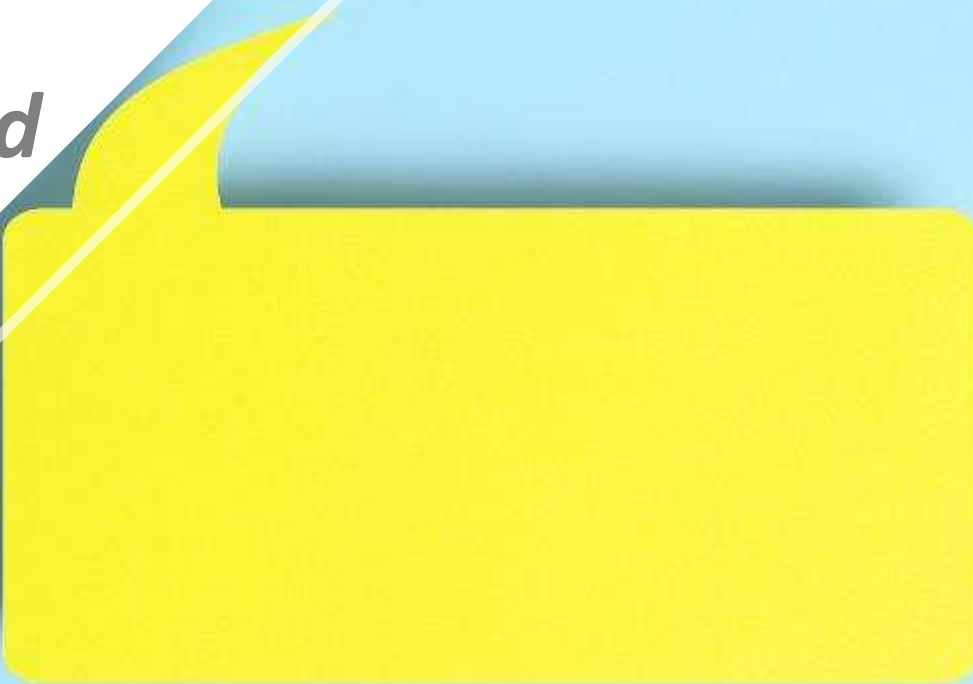
Kihlstedt, A. (2009). Capital campaigns: Strategies that work. Jones and Bartlett Publishers. p. 62.



C

“How can we make giving to this charity more compelling for other donors?”

D





A

“Do you mind if I ask, what is your connection to our mission [or organization]?”

Swank, K. (October 2009). What women want: Understanding the needs and objectives of women's philanthropic giving, including planned gifts. National Conference on Philanthropic Planning, National Harbor, MD. p. 9

B

“How could we connect with you better?”

Melvin, A. (2018, October). The ties that bind: Effective cultivation techniques. [Paper presentation]. Charitable Gift Planners Conference. Las Vegas, NV. p. 5



C

“How would you like to be more involved?”

Kihlstedt, A. (2013). Asking styles: Harness your personal fundraising power. CharityChannel Press. p. 22

D

“Is there any area within the organization where you could see yourself becoming more involved?”

Swank, K. (October 2009). What women want: Understanding the needs and objectives of women's philanthropic giving, including planned gifts. [Paper presentation]. National Conference on Philanthropic Planning, National Harbor, MD. p. 9

“Why do you give to this organization?”

Ahem, T., & Joyaux, S. P. (2011). Keep your donors: The guide to better communications & stronger relationships. John Wiley & Sons. p. 261.

Challenge  
↗  
**Identity** ← Victory  
↘

**Open (life history,  
people, or values)**  
*Why us?*

What’s motivated you to be such a consistent supporter [of this charity]?”

Fredricks, L. (2001). Developing major gifts: Turning small donors into big contributors. Aspen Publishers, Inc. p. 59.

“Why do you support us?”

Fredricks, L. (2001). Developing major gifts: Turning small donors into big contributors. Aspen Publishers, Inc. p. 59

Fridman, N. (2021, May 26). Why now is the perfect time to have a conversation about values, giving and your family's legacy [PowerPoint slides]. Life and Legacy Annual Gathering, online. p. 18.

“Why have you been such a loyal donor?”

“Why have you been so loyal?”

Tumolo, J. (August 24, 2016). The approach. [Blog]. Retrieved from <https://www.linkedin.com/pulse/approach-joseph-tumolo-cap/>

Challenge  
↗  
**Identity** ← Victory  
↘

**Open (life history,  
people, or values)**  
*Why us?*

“Why does what we do interest you?”

Ahern, T., & Joyaux, S. P. (2011). Keep your donors: The guide to better communications & stronger relationships. John Wiley & Sons. p. 76.

Ahern, T., & Joyaux, S. P. (2011). Keep your donors: The guide to better communications & stronger relationships. John Wiley & Sons. p. 261.

“Why do you serve on X committee?”

Melvin, A. (2018, October). The ties that bind: Effective cultivation techniques. [Paper presentation]. Charitable Gift Planners Conference. Las Vegas, NV. p. 5

“Why does this cause matter to you?”



A

“What’s the key thing that persuaded you to join our cause?”

Ross, B. & Segal, C. (2009). The influential fundraiser: Using the psychology of persuasion to achieve outstanding results. Jossey-Bass. p. 239.

B

“Why do you care so much that you would sacrifice your precious time and invest your limited dollars to move this mission forward?”

Stroman, M. K. (2014). Asking about asking: Mastering the art of conversational fundraising (2nd ed.). CharityChannel Press. p.58.



C

“When you think about programs such as ours, what motivates you to support them?”

Bristol, E. & Lysakowski, L. (2013). The leaky bucket: What’s wrong with your fundraising and how you can fix it. CharityChannel Press. p. 191.

D

“I understand you haven’t supported our cause significantly in the past; tell me more about that.”

Melvin, A. (2018, October). The ties that bind: Effective cultivation techniques. [Paper presentation]. Charitable Gift Planning Conference. Las Vegas, NV, p. 4.



“Of all the charities you could support, why do you support us?”

Fredricks, L. (2006). The ask: How to ask anyone for any amount for any purpose. John Wiley & Sons, p. 11.



**Open (life history,  
people, or values)**  
*Why us?*



# A caution about “Why?”

We often want to learn “why?”  
But using this word is risky.

“Why?” or “Why did you do  
that?”

- Can feel like an attack.
- Is what we say when a person has done something stupid.
- Can cause defensiveness.

Where possible, consider a  
substitute.

# What's your favorite type of question to connect "my people or values" identity with the challenge?

**A. Cause or charity people connections** "Have others in your life been affected by [this cause]?" "Is there anyone in your family who also cared about...?"

**B. Philanthropy people connections** "Did your parents or other family members support any charitable causes?" "Can you tell me a bit more about who taught you to be generous or where your generous spirit comes from?" "When you were young, was there anyone you considered as a role model for giving?"

**C. Values underlying giving motivations** "What inspires you to give?" "What inspired your first gift?" "How does your giving reflect your values, your feelings, and your aspirations?"

**D. Values underlying causes supported** "Tell me about a few other causes you support: why do you support them?" "Where else do you give, and why?"

**E. Values attributed to others** "What do you think are the most important factors to donors who make a major gift to our institution?" "What is the single most important reason that you believe someone would support the project?"

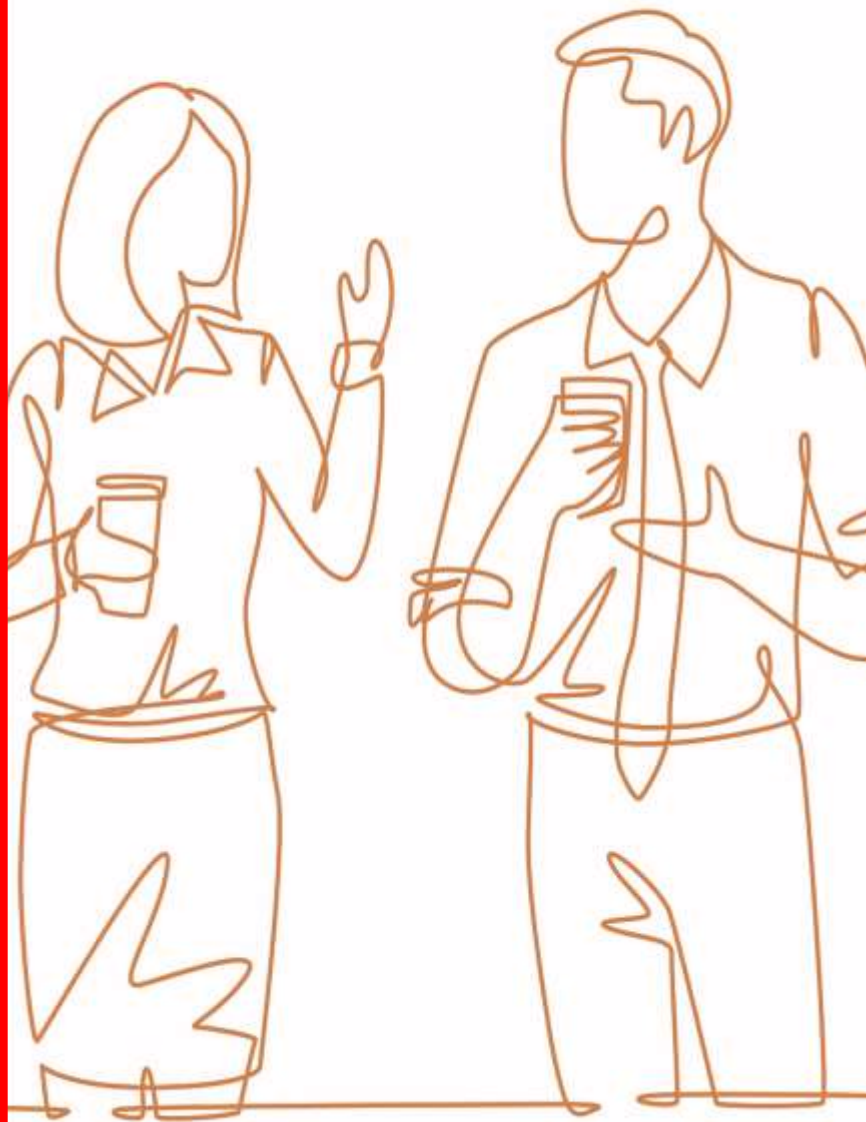
# “My people or values” identity connection question: Take a moment to construct your own example

- ***Cause or charity people connections*** “Have others in your life been affected by [this cause]?” “Is there anyone in your family who also cared about...?”
- ***Philanthropy people connections*** “Did your parents or other family members support any charitable causes?” “Can you tell me a bit more about who taught you to be generous or where your generous spirit comes from?” “When you were young, was there anyone you considered as a role model for giving?”
- ***Values underlying giving motivations*** “What inspires you to give?” “What inspired your first gift?” “How does your giving reflect your values, your feelings, and your aspirations?”
- ***Values underlying causes supported*** “Tell me about a few other causes you support: why do you support them?” “Where else do you give, and why?”
- ***Values attributed to others*** “What do you think are the most important factors to donors who make a major gift to our institution?” “What is the single most important reason that you believe someone would support the project?”



# “My people or values” identity connection

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- Work with another person. Change who will ask.
- Ask them your “My people or values” identity question.
- Listen to their answer.
- Ask at least one follow up question.
- As they are answering, try to think of a giving “challenge” that might be particularly attractive to them. If you do, ask “Would you be interested to hear more about how you could ...?”
- Afterwards, discuss the experience from both perspectives. Any ideas? alternatives?



# Part II: Defining Victory

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Examples of opening  
questions and phrases to  
define a meaningful victory

“What changes do you believe would make the world a better place?”

Ahem, T., & Joyaux, S. P. (2011). Keep your donors: The guide to better communications & stronger relationships. John Wiley & Sons. p. 262.

“If you could change the world, what would you do?”

Ahem, T., & Joyaux, S. P. (2011). Keep your donors: The guide to better communications & stronger relationships. John Wiley & Sons. p. 147.

Challenge  
↑  
Identity ← **Victory**

**Defining broadest  
victory:**  
*Global*

“How would you like to make a difference in this community? In this world?”

Ahem, T., & Joyaux, S. P. (2011). Keep your donors: The guide to better communications & stronger relationships. John Wiley & Sons. p. 262.



“What would you like to pass on to future generations?”

Ahem, T., & Joyaux, S. P. (2011). Keep your donors: The guide to better communications & stronger relationships. John Wiley & Sons. p. 262.

Challenge  
↑  
Identity ← **Victory**

“As you look out to the future, what is the legacy you would like to leave?”

Levine, J. & Selik, L. A. (2016). Compelling conversations for fundraisers: Talk your way to success with donors and funders. Chimayo Press. p. 76

**Defining broadest  
victory:  
*Legacy***

“What positive difference do you want to make?”

Gragg, A. (December 1, 2019). 20 questions to ignite meaningful conversations [Website].  
<https://www.decideyourlegacy.com/20-questions-to-ignite-meaningful-conversations/>



A

“If there were no restrictions on you, what would you like to do philanthropically?”

Lydenberg, J. (October 13, 2007). Identifying planned gift donors. [Paper presentation]. National Conference on Planned Giving, Grapevine, TX. p. 4

B

“In the best of all possible worlds, what would you do to support our charity?”

Lydenberg, J. (October 13, 2007). Identifying planned gift donors. [Paper presentation]. National Conference on Planned Giving, Grapevine, TX. p. 4

C

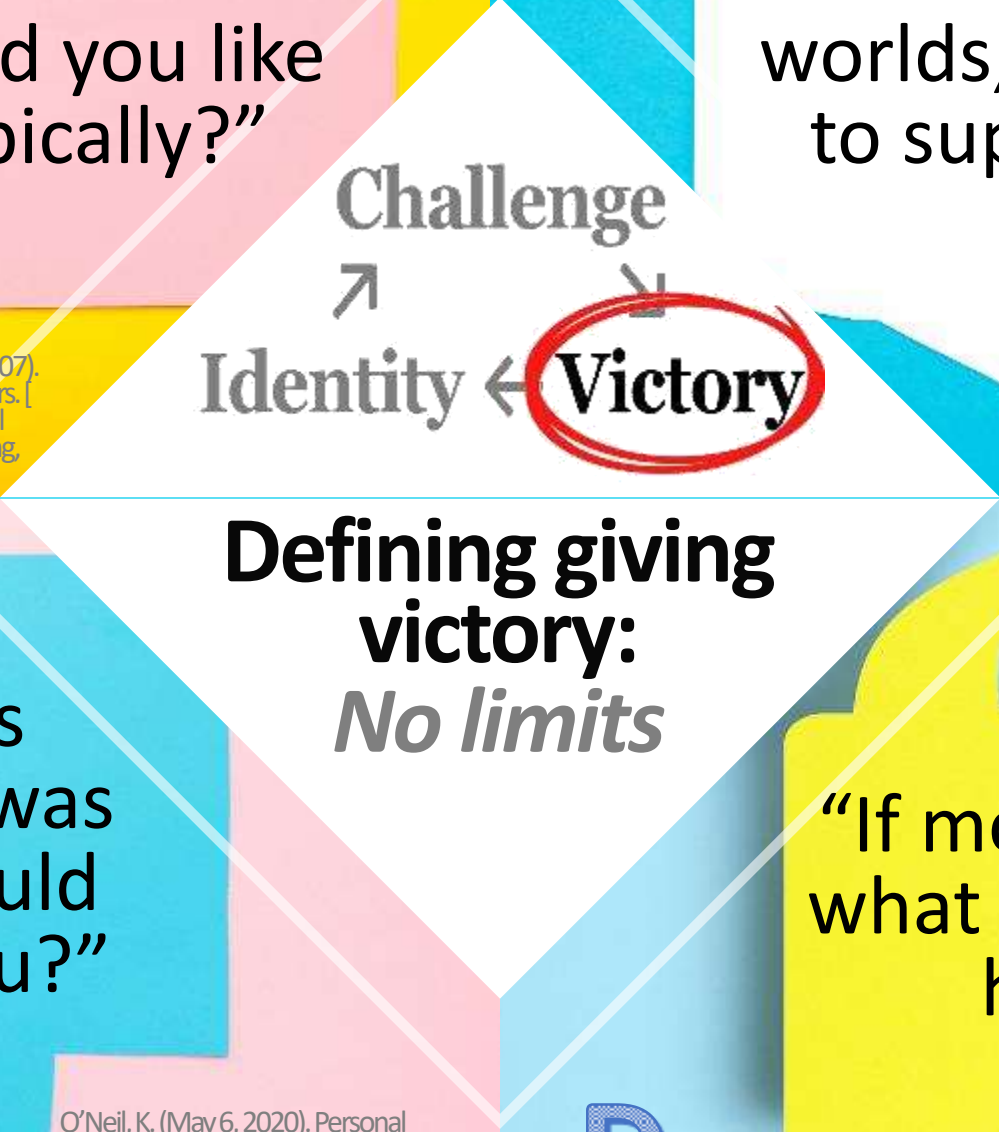
“If you could do anything for [this charity], if the sky was the limit, what would that look like to you?”

O’Neil, K. (May 6, 2020). Personal communication. Kim O’Neil Associate Vice President, Institutional Advancement, Texas Tech University.

D

“If money were no object, what would you like to see happen with our program?”

Tumolo, J. (2016). Simplify: A simple approach to building a sustainable planned giving program. Independently published. p. 77



“If money were no object,  
what would we be doing  
that we’re not  
now doing?”

Davidson, P.J. (2012). A planned giving  
plan of action: A three-year plan.  
[Paper presentation]. The National  
Conference on Philanthropic  
Planning, New Orleans, LA.  
p. 1.

“If money were no object,  
what kind of an impact  
would you like your giving to  
have?”



**Defining giving  
victory:**  
*No limits*

“What would be your  
dream gift?”

Melvin, A. (2018, October). The ties that  
bind: Effective cultivation techniques.  
[Paper presentation]. Charitable Gift  
Planning Conference. Las Vegas, NV, p. 4.

A

“What change do you want to see because of your giving?”

Fridman, N. (2021, May 26). Why now is the perfect time to have a conversation about values, giving and your family's legacy [PowerPoint slides]. Life and Legacy Annual Gathering, online, p. 17.

B

“What do you want to achieve with your charitable donations?”

Bristol, E. & Lysakowski, L. (2013). The leaky bucket: What's wrong with your fundraising and how you can fix it. CharityChannel Press. p. 186

Melvin, A. (2018, October). The ties that bind: Effective cultivation techniques. [Paper presentation]. Charitable Gift Planning Conference. Las Vegas, NV, p. 4

C

“What do you hope to achieve with your philanthropy?”

Lewzey, E. (2019). 4 powerful questions to ask your donors. [Website.] <https://www.blueskyphilanthropy.com/single-post/2019/05/15/4-powerful-questions-to-ask-your-donors>

D

“What would you ultimately like to accomplish with your philanthropy at our charity?”





“What are your goals for your Donor Advised Fund / Private Family Foundation? How long do you want it to last?”

Sharkey, G. (March 25, 2021). Personal communication. Greg Sharkey, Senior Philanthropy Advisor, The Nature Conservancy.

“What are you trying to accomplish with your philanthropy and how might we help?”

Schiller, R. (October 2017). What are donors telling us? [Powerpoint slides]. National Conference on Philanthropic Planning, Baltimore, MD. p. 34.

“As you think about making a difference with your philanthropy, what appeals to you most?”

Muir, R. (August 2016). The art of discovery and making the ask. [Powerpoint slides]. Presented at Fundraising Day Wisconsin.

“What kind of impact would you like to have on [this cause / these beneficiaries]?”

Fendrich-Turner, K. (September 9, 2020). Personal communication from Katy Fendrich-Turner, Director of Gift Planning, UT-Austin.

Challenge  
↑  
Identity ← **Victory**

**Defining giving  
victory:  
Overall**



“Do you have any lifetime charitable goals? Tell me about those.”

Steenhuysen, J. (October 2012). Philanthropy planning: What to say and do in the room with your donors/clients to explore and document their philanthropy mission. [Paper presentation]. National Conference on Philanthropic Planning, New Orleans, LA. p. 9.



“What would you want to do [or like to accomplish]...”

Advancement Resources. (November 15, 2017). The power of the pause: Using silence in donor conversations, [Web page] <https://advancementresources.org/the-power-of-the-pause-using-silence-in-donor-conversations/>

“... with your money [or giving or philanthropy] in this cause [or at this charity] ...”

Begun, M. S., & Rosandich, S. (October 2009). Retreats, circles, squares & blogs: donor collaborations that work. [Paper presentation]. National Conference on Philanthropic Planning, National Harbor, MD. p. 2. (“What do you want to accomplish with your philanthropy?”);

**Defining giving victory:**  
*Overall*

Shaw-Hardy, S., Taylor, M. A., & Beaudoin-Schwartz, B. (2010). Women and philanthropy: Boldly shaping a better world. John Wiley & Sons. p. 115, quoting from Advancement Resources. (2006). The art and science of donor development workbook. Advancement Resources, LLC. (“What would you want to do with your money that is meaningful to you?”)

“... that would be meaningful to you?”

A

“What are your goals for this gift?”

Rice, N. (May 4, 2020). Personal communication from Nathan Rice, Senior Director of Gift Planning for Institutional Advancement, Texas Tech University.

B

“What kind of impact do you want to make with your gift?”

Wilkes, C. (May 2, 2020). Personal communication from Cliff Wilkes, Major Gift Officer, Texas Tech University Health Sciences Center.



**Defining giving victory:**  
*Single gift*

Lumpkin, S. & Comfort, J. (2018, August) How to Have the MOST Productive Conversations: From Here to Eternity..., [Paper presentation]. Colorado Planned Giving Roundtable, 30th Annual Summer Symposium, Denver, CO.

C

*[If the donor has a current scholarship, endowment, etc.]*  
“what kind of impact do you ultimately want it to have?”

Wilkes, C. (May 2, 2020). Personal communication from Cliff Wilkes, Major Gift Officer, Texas Tech University Health Sciences Center.

D

“Have you thought about how you would like your planned bequest gift to be used?”

“A year from now, how would you know that you made a wise move with your philanthropic investment in us?”

Eskin, J. (2019). 10 Simple Fundraising Lessons: A common sense guide to overcoming your fear of asking for gifts. Eskin Fundraising Training, LLC. p. 39

Challenge  
↑  
Identity ← **Victory**

“If you were going to make a significant investment in the hospital, a gift in the million-dollar range, what would you like to accomplish with that gift?”

Janney, S. (October 2013). The meaning of money. [Paper presentation]. National Conference on Philanthropic Planning, Minneapolis, MIN. p. 2.

**Defining giving  
victory:**  
*Single gift*



A

“If you could change anything to better [this charity], what would it be?”

De Luca, C. C. (May 4, 2020). Personal communication. Carolina Camargo De Luca, Discovery Officer, Texas Tech University Health Sciences Center El Paso.

B

“You’ve been such a loyal member of the ABC Charity family, and have supported ABC Charity’s mission for so many years, what are your dreams for where you’d like to see ABC Charity go in the future?”

Comfort, J. & Lumpkin, S. (October 2017). How to Have the MOST Productive Conversations: From Here to Eternity... [Paper presentation]. National Conference on Philanthropic Planning, Baltimore, MD. p. 6.

Comfort, J. & Lumpkin, S. (October 2017). How to Have the MOST Productive Conversations: From Here to Eternity... [Paper presentation]. National Conference on Philanthropic Planning, Baltimore, MD. p. 6.

C

“What are your long-term hopes for our charity and its mission?”

Sagrestano, B. M. & Wahlers, R. E. (2016). Getting started in charitable gift planning: The resource book. CharityChannel Press. p. 90.

D

“If you had the ability to enhance or expand ABC Charity’s mission in a specific way, what would it be? What could we do to be more effective in the future?”



**Defining  
organizational  
change  
victory**



“Where do you think we could improve our services or programs?”

Swank, K. (October 2009). What women want: Understanding the needs and objectives of women's philanthropic giving, including planned gifts. National Conference on Philanthropic Planning, National Harbor, MD. p. 9.

Challenge  
↑  
Identity ← **Victory**

“Are there any thoughts you'd like me to take back to share with our CEO/president/executive director?”

Swank, K. (October 2009). What women want: Understanding the needs and objectives of women's philanthropic giving, including planned gifts. [Paper presentation]. National Conference on Philanthropic Planning, National Harbor, MD. p. 9.

“What are the most critical results you expect our organization to produce?”

Ahern, T., & Joyaux, S. P. (2011). Keep your donors: The guide to better communications & stronger relationships. John Wiley & Sons. p. 261

**Defining  
organizational  
change  
victory**

Ahern, T., & Joyaux, S. P. (2011). Keep your donors: The guide to better communications & stronger relationships. John Wiley & Sons. p. 11

“What could we do better in your opinion?”

“If you could change anything about [this organization, issue or project], what would it be?”

McLeod, L. (2013). Selling with noble purpose: How to drive revenue and do work that makes you proud. Wiley. p. 120.



“If there was one thing you could change about our charity today, what would it be?”

Sagrestano, B. M. & Wahlers, R. E. (2016). Getting started in charitable gift planning: The resource book. CharityChannel Press. p. 9

A

“What means the most to you personally about what ABC Charity does?”

Comfort, J. & Lumpkin, S. (October 2017). How to Have the MOST Productive Conversations: From Here to Eternity... [Paper presentation]. National Conference on Philanthropic Planning, Baltimore, MD. p. 6.

B

“What areas of [this charity] are you most interested in?”

Modified from Fredricks, L. (2006). The ask: How to ask anyone for any amount for any purpose. John Wiley & Sons. p. 14. (“what are you most interested in about our organization?”)



**Defining  
organizational  
interest  
victory**

Perry, G. (2007). Fired-up fundraising: Turning board passion into action. John Wiley & Sons, Inc., p. 42; See also Levine, J. & Selik, L. A. (2016). Compelling conversations for fundraisers: Talk your way to success with donors and funders. Chimayo Press. p. 46.; Eisenstein, A. (2014). Major gift fundraising for small shops: How to leverage your annual fund in only five hours per week. CharityChannel Press. p. 65

C

“What interests you personally about the problem we are addressing?”

Perry, G. (2007). Fired-up fundraising: Turning board passion into action. John Wiley & Sons, Inc., p. 122.

D

“What excites you the most about our organization’s work in the world?”



“What were your impressions of the tour? ... What intrigued you most?”

Perry, G. (2007). *Fired-up fundraising: Turning board passion into action*. John Wiley & Sons, Inc. p. 135



“Is there a particular program, project, or area of outreach [scholarship fund, award, etc.] that interests you most?”

Fredricks, L. (2001). *Developing major gifts: turning small donors into big contributors*. Gaithersburg, MD: Aspen Publishers, Inc. p. 59

“If you were to make a significant commitment, is there a particular area you would want your gift to support?”

Smith, C. (2017). *Extend your reach: How major gift officers become active partners in gift planning efforts*. [Paper presentation]. National Conference on Philanthropic Planning, Baltimore, MD. p. 19.

“Based on what you have told me about your experiences, memories, wishes, etc., if I can help you find a way, what at our nonprofit would you most like to support financially?”

Levine, J. & Selik, L. A. (2016). *Compelling conversations for fundraisers: Talk your way to success with donors and funders*. Chimayo Press. p. 79



“What do you think we do best?”

Swank, K. (October 2009). What women want: Understanding the needs and objectives of women's philanthropic giving, including planned gifts. National Conference on Philanthropic Planning, National Harbor, MD. p.9.



“What do you think is the best thing about what our non-profit does?”

Melvin, A. (2018, October). The ties that bind: Effective cultivation techniques. [Paper presentation]. Charitable Gift Planning Conference. Las Vegas, NV. p. 5.

Melvin, A. (2018, October). The ties that bind: Effective cultivation techniques. Charitable Gift Planning Conference. Las Vegas, NV, p. 5.

“What contributions to the community does the organization make that are important to you?”

Kihlstedt, A. (2009). Capital campaigns: Strategies that work. Jones and Bartlett Publishers. p. 61.

“What’s the most exciting thing you’ve heard about our institution recently?”

A

“What do you think about this opportunity?”

B

“What is most compelling to you about the project?”



Kihlstedt, A. (2009). Capital campaigns: Strategies that work. Jones and Bartlett Publishers. p. 62.

Perry, G. (2007). Fired-up fundraising: Turning board passion into action. John Wiley & Sons, Inc., p. 125

**Defining victory  
with a  
gift option**

C

“Could you ever see yourself being involved in a project like this?”

Stroman, M. K. (2014). Asking about asking: Mastering the art of conversational fundraising. (2nd ed.). CharityChannel Press. p. 174

D

[After an event describing a project ask]  
“What were your impressions of the event?”

**A**

“Which of these projects would be most meaningful/important to you?”

**B**

“If you had to choose between making a gift toward the new building, the scholarship fund, or our endowment, which would you select? Why?”

Challenge  
 ↑  
 Identity ← **Victory**

Stroman, M. K. (2014). Asking about asking: Mastering the art of conversational fundraising (2nd ed.). CharityChannel Press. p. 158.

Stroman, M. K. (2014). Asking about asking: Mastering the art of conversational fundraising (2nd ed.). CharityChannel Press. p. 157.

**Defining victory with a menu of gift options**

“If you could have your family’s name on something like a building, scholarship, lectureship, what would be most meaningful to you?”

“After outlining the various projects to be funded by a campaign, ask, ‘If you had the money to fully fund any one aspect of the project, what would it be?’”

Modified from De Luca, C. C. (May 4, 2020). Personal communication. Carolina Camargo De Luca, Discovery Officer, Texas Tech University Health Sciences Center El Paso.

**D****C**



“What if [this goal was accomplished]?  
What would that mean to you?”

“What would it mean for you to make a personal impact in saving, or extending, the lives of women living with breast cancer?”



Pittman-Schulz, K. (October, 2012). In the door and then what? Presented at the National Conference on Philanthropic Planning, New Orleans, LA. p. 14.

Stroman, M. K. (2014). Asking about asking: Mastering the art of conversational fundraising (2nd ed.). CharityChannel Press. p. 189-190.

## Defining victory with gift implications: *Personal*

“What would it mean for you and your family to have an enduring impact in improving cancer therapies while assuring your own family’s financial future?”

“What are your thoughts about naming facilities or programs after benefactors? ... But what about you? How would you feel about associating your name with this project?”

Pittman-Schulz, K. (October 2012). In the door and then what? Presented at the National Conference on Philanthropic Planning, New Orleans, LA. p. 145



A

“Does your philanthropy give you joy?”

Rothey, R. (October 2017). Bankers and lawyers and CPAs—Oh my! Collaborating with advisers. [Paper presentation]. National Conference on Philanthropic Planning. Baltimore, MD. p. 6.

B

“What philanthropic gift has given you the greatest joy? How?”

Muir, R. (August 2016). The art of discovery and making the ask. [Powerpoint slides]. Presented at Fundraising Day Wisconsin.



**Defining victory with gift implications:**  
*Personal*

“What makes giving a rewarding experience?”

Eskin, J. (2019). 10 Simple Fundraising Lessons: A common sense guide to overcoming your fear of asking for gifts. Eskin Fundraising Training, LLC. p. 39

C

D

“Why do you think this project is important to the community?”

Kihlstedt, A. (2009). Capital campaigns: Strategies that work. Jones and Bartlett Publishers. p. 61.

Challenge  
↗  
Identity ← **Victory** ↘

“What would the world look like in ten years, if the women who died of breast cancer last year, hadn’t? How would families and communities be different because of the accomplishments those women would have made?”

Pittman-Schulz, K. (October 2012). In the door and then what? [Paper presentation]. The National Conference on Philanthropic Planning, New Orleans, LA. p. 14.

**Defining victory  
with gift  
implications:**  
*Community*

“What would have to happen for you to say yes [to a gift request, invitation to serve, etc.]?”

Stroman, M. K. (2014). Asking about asking: Mastering the art of conversational fundraising (2nd ed.). CharityChannel Press. p. 104.



“So, [yes] I do understand why you stopped supporting us. What can we do to bring you back into the fold?”

Levine, J. & Selik, L. A. (2016). Compelling conversations for fundraisers: Talk your way to success with donors and funders. Chimayo Press. p. 53.

## Defining victory barriers

What would motivate you or your business to invest in a nonprofit organization?”

Bristol, E. & Lysakowski, L. (2013). The leaky bucket: What's wrong with your fundraising and how you can fix it. CharityChannel Press. p. 198.



**A**

“Tell me about some meaningful gifts that you have made.”

Steenhuysen, J. (October 2012). Philanthropy planning: What to say and do in the room with your donors/clients to explore and document their philanthropy mission. National Conference on Philanthropic Planning, New Orleans, LA. p. 8.



**B**

“How do you know when you have made a ‘good gift?’ Share a couple of examples of ‘good gifts’ with me. Why did you feel they were good?”

Steenhuysen, J. (October 2012). Philanthropy planning: What to say and do in the room with your donors/clients to explore and document their philanthropy mission. [Paper presentation]. National Conference on Philanthropic Planning, New Orleans, LA. p. 8.

## Defining victory with past giving

**C**

“I understand you made a significant gift to X at our institution a while back; How do you feel about how we used your funds?”

Melvin, A. (October 2018). The ties that bind: Effective cultivation techniques. [Paper presentation]. Charitable Gift Planning Conference. Las Vegas, NV. p. 5.

**D**

“When you look at all of your giving, be it time or money, what captures your heart and your attention?”

Perry, R. & Schreifels, J. (2014). It's not just about the money: How to build authentic major donor relationships. Veritus Group. p. 135



# What's your favorite type of question to help the donor define a personally meaningful victory?

- ***Global victory*** “If you could change the world, what would you do?” “How would you like to make a difference in this community? In this world?”
- ***Legacy victory*** “What would you like to pass on to future generations?” “What positive difference do you want to make?”
- ***No limits victory*** “If you could do anything for [this charity], if the sky was the limit, what would that look like to you?” “If money were no object, what would we be doing that we're not now doing?” “What would be your dream gift?”
- ***Overall victory*** “What change do you want to see because of your giving?” “What would you ultimately like to accomplish with your philanthropy at our charity?” “Do you have any lifetime charitable goals? Tell me about those.” “What would you like to accomplish with your money / giving / philanthropy in this cause or at this charity that would be meaningful to you?”
- ***Org change victory*** “You've been such a loyal member of the ABC Charity family, and have supported this mission for so many years, what are your dreams for where you'd like to see ABC Charity go in the future?” “If you had the ability to enhance or expand ABC Charity's mission in a specific way, what would it be?”

# Define a meaningful victory question: Take a moment to construct your own example

- ***Global victory*** “If you could change the world, what would you do?” “How would you like to make a difference in this community? In this world?”
- ***Legacy victory*** “What would you like to pass on to future generations?” “What positive difference do you want to make?”
- ***No limits victory*** “If you could do anything for [this charity], if the sky was the limit, what would that look like to you?” “If money were no object, what would we be doing that we’re not now doing?” “What would be your dream gift?”
- ***Overall victory*** “What change do you want to see because of your giving?” “What would you ultimately like to accomplish with your philanthropy at our charity?” “Do you have any lifetime charitable goals? Tell me about those.” “What would you like to accomplish with your money / giving / philanthropy in this cause or at this charity that would be meaningful to you?”
- ***Org change victory*** “You’ve been such a loyal member of the ABC Charity family, and have supported this mission for so many years, what are your dreams for where you’d like to see ABC Charity go in the future?” “If you had the ability to enhance or expand ABC Charity’s mission in a specific way, what would it be?”

# Help the donor to define a personally meaningful victory

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- Work with another person. Choose who will ask.
- Ask them your meaningful victory question.
- Listen to their answer.
- Ask at least one follow up question.
- As they are answering, try to think of a giving “challenge” that might be particularly attractive to them. If you do, ask “Would you be interested to hear more about how you could ...?”
- Afterwards, discuss the experience from both perspectives. Any ideas? alternatives?

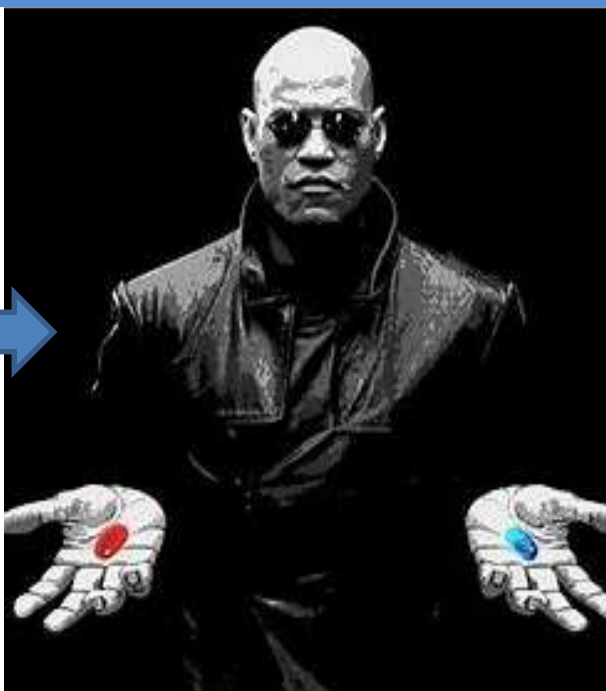
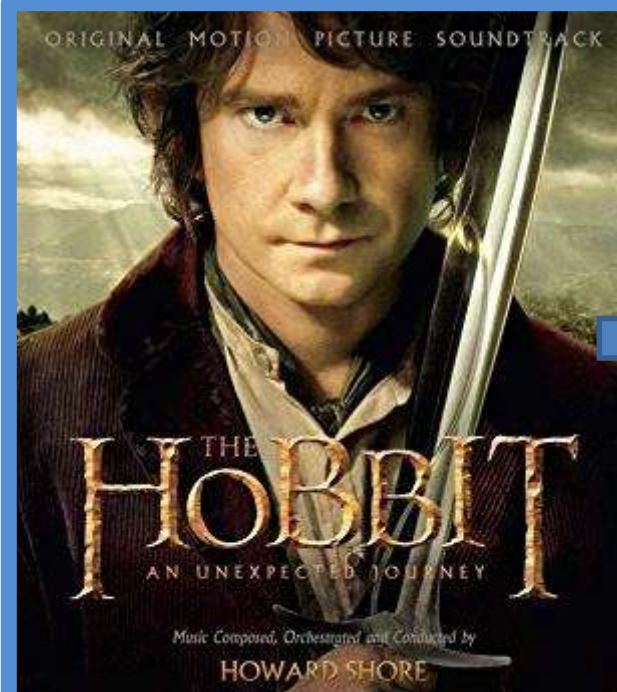


# Advance the Donor's

## Hero Story







**In the monomyth, the sage challenges the hero with a choice**

Go beyond his small, self-focused world  
Pursue the hope of victory impacting the larger world

Become a transformed (internal) and honored (external) victor who brings a boon back to his original world

In the donor's hero story, the fundraiser is the guiding sage

- 
- This guiding sage challenges with a choice
  - This happens at the ask



**Original Identity → Challenge → Victory → Enhanced Identity**

A compelling  
fundraising  
challenge

- Connects to the donor's original identity (history, people, or values)
- Promises the hope of a victory impacting the larger world, and
- Delivers enhanced identity: internal (private meaning) or external (public reputation)



# The (donor) hero story cycle

- Including each step makes the ask compelling
- It advances the donor's hero story



**Original Identity →  
Challenge →  
Victory →  
Enhanced Identity**

**Challenge**  
↗      ↘  
**Identity ← Victory**



Elicit the donor's  
**PEOPLE** (family and affiliations)  
**VALUES** (beliefs and principles)  
**HISTORY** (key life story elements)

- Connect these identity elements with generosity and impact
- Connect them with the specific cause or charity
- Connect them with a specific project or work within the charity
- Review and confirm each step in the cycle at the proposal
- Reference each step in the cycle at the ask



# Steps in Socratic fundraising



1. Justify asking questions
2. Ask questions that
  - Connect to the donor's **identity** (history, people, values)
  - Define a personally meaningful **victory**
3. Ask questions that present a **challenge**

# 1. Justify asking questions



- I'm interested in your story  
*(Social motive)*
- I need your help or advice  
*(Honor/impact motive)*
- I can help or advise you  
*(Value motive)*

2. Ask questions that connect with the donor's identity and define a personally meaningful victory



1. Ask opening questions
2. Ask follow-up questions
3. Ask confirmation questions after reflective statements
4. Spot solutions while repeating these steps



### 3. Ask questions that make the Challenge



1. Ask for permission to ask
2. Connect the gift with the full story cycle
  - Restate and confirm the identity connections (Original Identity → Challenge; Victory → Enhanced Identity)
  - Make the case for support (Challenge → Victory)
3. Ask for the gift

# The tightening spiral



- The steps in this story cycle are an ongoing, repeated, circular narrative
- Socratic fundraising progresses from general to specific, from broad to narrow

# Original Identity → Challenge

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“I am the kind of person who makes gifts like this” Why?

Because of my **people**, i.e.,

- “People like me make gifts like this”

Because of my **values**, i.e.,

- “Giving to this cause or charity fits my values”

Because of my **history**, i.e.,

- “Giving to this cause or charity fits my life story”



# Victory → Enhanced Identity

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“I want to be (or be seen as) the kind of person who makes an impact like this”

Why?

Because of my **people**, i.e.,

- “This impact helps (or is supported by) people like me (or with me)”

Because of my **values**, i.e.,

- “My values make this impact meaningful to me”

Because of my **history**, i.e.,

- “My life story makes this impact meaningful to me”





# Challenge → Victory

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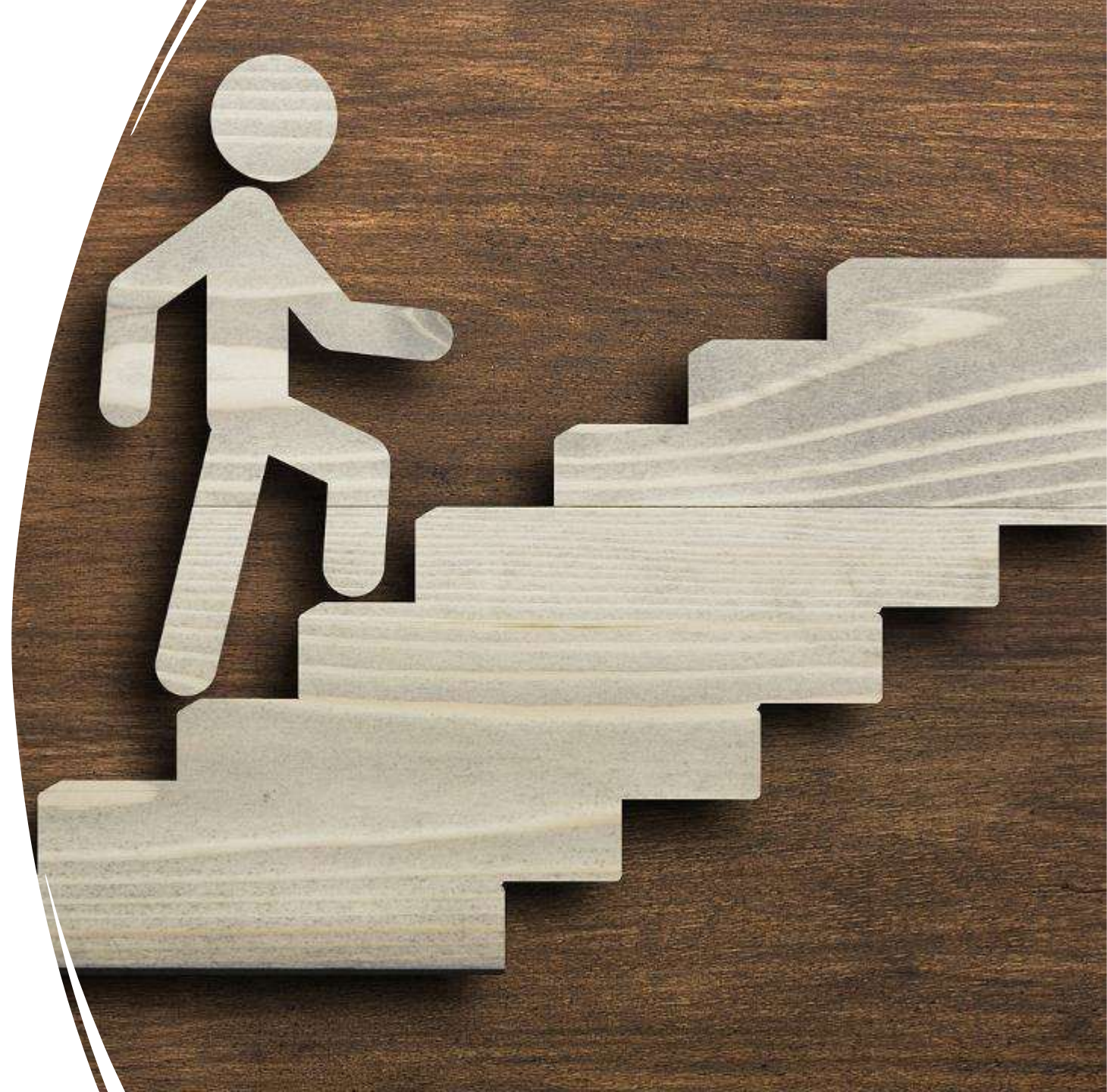
“This gift will make this tangible  
(visualizable) impact”



## Part III: After the opening

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- Follow-up questions
- Reflective summary and confirmation question
- Spot solutions
- Ask for the next step



“Would you tell me more about that?”

“How do you mean?”

Continuing the conversation

**Follow up questions:**  
Open ended

“How so?”

“How did you feel about that?”

“How did you feel when that happened?”



“What happened next?”  
“Really!” “Tell me more.”

“What else?”

Continuing the  
conversation

**Follow up  
questions:**  
Open ended

“Can you give me an  
example of that?”

“What led you to that?”



“Tell me more about ....”

“What happened after you  
...?”

Show you've been  
listening

**Follow up  
questions:  
Reflective**

“What's an example of  
...?”

“How does .... fit into the  
picture?”

# Reflective summary and confirmation question

We've been listening for links that connect to a challenge:

- Identity connections
- Victory connections

Now, we summarize and confirm the donor's connections



# Highlight & confirm donor connections

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## 1. Reflective transition

“So, what you are saying is ...” “It feels like you are ...” “It sounds to me like ...” “So, you are thinking about ...” “So, what I’m hearing is...” “I’m picking up that ...” “I’m noticing that...” “So, your experience has been ...” “I’m getting the sense that ...” “I think what I heard is that ...” “Would I be correct in saying that ...” “So, you’re saying that ...”

## 2. Reflective statement

Summarize, highlight, or repeat key statements supporting a connection.

## 3. Confirmation question

“Do I have it right?” “Is that it? Is that right?” “Is that what happened?” “Does that sound right?” “Am I getting it right?” “Is that the right idea?”

# Spot solutions



- We've been listening
- We've been identifying connections
- We've been confirming those connections
- Now we match these with donor experiences or gift options



# Spot solutions: Strengthen connections



- What experiences would strengthen these connections?
- Are there particular programs, areas, or projects that match?
- What employees, beneficiaries, or other donors should they meet?

“Can we set a time so I could show you one of our facilities?”

Levine, J. & Selik, L. A. (2016). Compelling conversations for fundraisers: Talk your way to success with donors and funders. Chimayo Press. p. 25

**Challenge**



**Identity ← Victory**

“Do you think you have time for a tour sometime in the next two weeks?”

Levine, J. & Selik, L. A. (2016). Compelling conversations for fundraisers: Talk your way to success with donors and funders. Chimayo Press. p. 7

**Ask for the next step:  
Strengthen the  
connections**

“Would you be interested in attending [this event]?”

“I think you would be a fantastic addition to our [board, committee, or group]. What are your thoughts on that?”

# Conclusion



There may not be one magic question. Use whatever works for you. But there is a magic journey.

The magic journey is the hero's journey. It's also the donor's journey. Questions can help advance that donor hero's journey.



# SOCRATIC FUNDRAISING OVERVIEW



*A step-by-step  
menu of questions*