The Donor Conversation Guide

Prepare with purpose. Ask the questions that matter.
Listen. Follow through.



> **“Tell me about the first time you experienced philanthropy.”**

A practical resource adapted from Anne Murphy’s original Is My Donor Ready For a Gift Convo? guide and Donor Visits 2.0 teaching materials.

Inside: mindset • meaningful conversations • preparation • donor motivation • decision-making • goals • capacity • listening • readiness • follow-up • a detachable question cheat sheet

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01 Start on common ground

Donors are regular people. They have hopes and dreams, fears, complicated relationships, competing priorities, and different experiences with money and generosity. Donors, fundraisers, and the people our organizations serve each play an important role. No one is more important than the others.

Your role is to help a donor understand opportunities to advance their values through your organization. That means bringing genuine curiosity and professional judgment into the conversation—not performing a script.

> **"Ask good questions. Listen like there's no tomorrow."**

Reflect on your own mindset

Before a consequential gift conversation, consider the questions Anne uses in her original writing:

- When did you first see someone give something away as a gift?
- When have you been the beneficiary of someone's philanthropy?
- What preconceived notions do you have about donors?
- How do you feel when you think about asking for money?

Your personal experiences are useful context. They should not become assumptions about the person sitting across from you.

What counts as a meaningful gift conversation?

The Donor Visits 2.0 curriculum defines a productive "visit" as an open, honest, intentional dialogue about philanthropy with agreed-upon next steps. It can happen in person, on Zoom, by telephone, or around an event. The location does not determine its value.

02 Prepare everyone

Preparation has three parts: prepare yourself, prepare the donor, and prepare your meeting partner. The goal is not to know everything. It is to make the most of the conversation.

Prepare yourself

- Review the giving history, gift agreements, volunteer activity, prior contact reports, and documented interests.
- Clarify your desired outcome. What would a successful meeting accomplish?
- Identify what you need to learn and select the questions most likely to help.
- Practice your opening, essential talking points, and closing.
- Consider objections or questions without assuming the donor will raise them.

Don't get trapped in a rabbit hole. You need to be prepared enough to listen, not burdened by an encyclopedic briefing.

Prepare the donor

- Ask for a short pre-visit conversation when appropriate.
- Confirm time, location, duration, participants, and purpose.
- Co-create the agenda. Invite topics the donor wants to be sure to discuss.
- Be transparent that the meeting is outcome-oriented and may include philanthropy.

Prepare your meeting partner

- Hold a verbal briefing. Agree on the desired outcome and roles.
- Specify who facilitates, who makes the essential points, and who handles questions.
- Discuss sensitive topics and schedule a debrief before the meeting takes place.

A productive meeting is not the meeting with the most talking points. It is the meeting where everyone knows why they are there.

03 Start with the donor's story

Anne's original guide identifies one question as her most effective opening:

> **"Tell me about the first time you experienced philanthropy."**

Let the person tell you the story. Who gave? Who received? Was it a family member, a friend, a neighbor, or an organization? What happened, and what did it mean?

Listen for the way the experience shaped their understanding of generosity. Follow the story rather than immediately changing subjects.

Questions from the original guide

- "What are your hopes and dreams for [our students, our school, etc.]?"
- "How important is it to you to leave a legacy?"
- "I saw that you made an amazing gift to [wherever]. What inspired that? I'm so curious! Tell me everything."
- "What's the most satisfying giving experience you've had so far? What did you enjoy about it?"

Practical exercise

In pairs, have one person describe their first experience with philanthropy and how it influenced their giving. The other listens and asks only short follow-up questions. Switch roles. Then discuss what you learned and what you initially assumed.

This exercise appears in the Donor Visits 2.0 master deck. It illustrates the difference between collecting facts and learning what matters to a person.

04 Understand goals and impact

Motivation tells you why giving matters. Goals tell you what the donor hopes to accomplish. Don't assume that enthusiasm for your organization automatically establishes alignment with a particular gift opportunity.

Questions from the original guide

- "Are you someone who wants to change an individual life, impact a whole community, or make a difference on a global level?"
- "What factors do you consider when you make an investment of any kind?"
- "How do you like to be involved with the organizations you support?"
- "Do you support special initiatives? Does a campaign motivate you? Do you enjoy making gifts on a set schedule?"
- "Now that you've [done whatever thing], may I ask you how you see yourself making an impact? Do you envision playing a role here?"

Adapt without replacing the underlying question

For a school or university, ask what the donor hopes students will experience. For an arts organization, explore the role art has played in their life. For a community facility, ask what opportunities they want future generations to have. These are examples of adaptation—not quotations from Anne's original guide.

Listen for

- The change the donor wants to make.
- The scale and timeframe that feel meaningful to them.
- How involved they want to be beyond a financial gift.
- What a satisfying philanthropic outcome looks like in their own words.

05 Learn how decisions get made

A promising conversation can stall when you do not understand the actual decision process. Ask who participates, how information is evaluated, and what form of proposal works best.

Questions from the original guide

- “How do you involve your [family/spouse/kids] in your decision-making about giving?”
- “Do you have a trusted advisor you work with?”
- “Would it be helpful to bring [whoever] into the conversation? Tell me...what would that look like?”

Those bracketed options are prompts to adapt, not assumptions about the donor’s relationships.

Communication preferences matter

Learn whether the donor prefers one-to-one conversations, small groups, events, briefings, slides, proposals, phone calls, email, or print. The original guide explicitly urges fundraisers to consider how the donor and other decision-makers consume information.

Record the preferences in your CRM so you and colleagues can honor them. Don’t infer a communication preference from age or other demographic characteristics.

06 Discuss capacity with care

Capacity affects the amount, timing, and structure of a potential gift, but it is not the same as philanthropic interest or readiness. The original Canva guide includes questions that can naturally surface economic context:

- “How is the economy affecting your business/family/life?”
- “Do you serve on any non-profit boards? Tell me about your experiences!”
- “Have you had a chance to travel or visit with friends/family this year?”

Ask only what is relevant and appropriate to the relationship. A donor’s lifestyle or family circumstances do not reliably establish liquid assets or willingness to give. Confirm material details directly and respectfully when discussing an actual gift.

07 Listen and document accurately

Effective listening is not waiting for your turn to speak. The original materials emphasize using “Tell me…” questions, short follow-ups, and pauses to give people space to develop their thoughts.

Follow-up prompts from the original guide

- “Did you resonate with that? Can you say more about that?”
- “What did that mean to you?”
- “Tell me how that came about?”
- “Did I answer your question?”

And sometimes: Don’t ask a question. Be quiet. Give people space to think.

The contact report

The Donor Visits 2.0 curriculum includes a Supercharged Contact Report. After the meeting, capture the purpose, interests, motivations, concerns, decision-making, relevant capacity information, timing, communication preferences, and next steps.

Preserve the donor’s story. Separate what they actually said from your impressions or hypotheses, and do not invent missing information.

08 Evaluate readiness

A donor can be engaged without being ready for a particular solicitation. Use evidence across these dimensions, then ask the donor directly rather than treating a checklist as a prediction.

- Motivation: What do they value?
- Alignment: Is there an opportunity that fits those values?
- Decision-making: Who participates and what is the process?
- Capacity and structure: What is feasible and suitable?
- Timing: When would a decision be appropriate?
- Willingness: Have they signaled interest in discussing an actual commitment?

09 Follow up with gusto

The master deck identifies three keys to moving conversations forward: pre-work, speed, and clarity. A good meeting deserves a good close and prompt follow-through.

Immediately after the meeting

- Debrief with colleagues while details are fresh.
- Complete a contact report that distinguishes quotes, facts, interpretation, and next actions.
- Note every agreement and who owns it.
- Send a clear, personalized follow-up—ideally within 24 hours when practical.

Questions when progress slows

- “Has anything changed?”
- “What can we clarify in order to move forward?”
- “When is a good time for us to circle back?”
- “I sense you may have some trepidation. How can I help?”

Those examples are from the Donor Visits 2.0 master deck. They support clarity without pretending that every conversation must produce an immediate yes.

Your five-step meeting rhythm

- Before: Define the desired outcome and select questions.
- Open: Confirm purpose and agenda.
- Explore: Ask, follow the donor’s story, and listen.
- Close: Confirm what happens next.
- After: Document, thank, assign, and follow through.

Questions are a compass, never a script.

A final check before your next visit

Use the separate printable cheat sheet at your desk or attach it to your meeting notes. Choose three to five questions, not twenty. The value is in the conversation and what you do with the answers.

PAPPA After the Conversation

Sort what you heard into Passion, Assets, People, Property, and Approach.

Supercharged Contact Report

Record the donor's words, the commitments each person made, and what still needs checking.

Donor Meeting Follow-Up

Use your contact report to prepare the donor's recap and assign the next steps.

Donor Conversation Cheat Sheet

Print the meeting plan and the question pages you need. Each question has a listening cue.

Source and editorial note

This publication is an edited, organized teaching resource. The quotation-marked questions were drawn from Anne Murphy's Canva guide Is My Donor Ready For a Gift Convo? or the Donor Visits 2.0 master deck; connective prose and selected examples were adapted for readability. The original materials include historical biographical text and dated references that have not been reused as current claims.

Source designs: Canva GUIDE: Is My Donor Ready For a Gift Convo? (DAFv9LAcpWw), Ebook: Is My Donor Ready For a Gift Convo? (DAE9PNUQdNo), and MASTER DECK DONOR VISITS 2.0 (DAF9hnKKoY4).

The question bank also draws on Anne Murphy's The Donor Conversation Guide in Gamma and the mission-specific questions in the Empowered Fundraiser Consulting web guide. The listening notes apply the source teaching to each prompt. Repeated questions appear together. The follow-up worksheet draws on Follow Up With Gusto and the Supercharged Contact Report.

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PAPPA after the conversation

Fill in the map in the debrief afterward, then let Approach set the next move. Write down a phrase you want to remember on each line.

Passion

What they care about, in the words they used. What lights them up, what they return to unprompted. The moment their voice changed, a story they did not have to tell

Assets

Capacity signals, giving history, and non-financial assets like credibility, board experience, and influence. What decisions they control, whose opinion they can change, what they have given before and what prompted it. When there is nothing on record, say the blank is a blank

People

Their network. Spouse, family, colleagues, board ties, the friends who function as their scouts, and anyone they named

Property

What they own. Real estate and holdings, only if it came up. Mark it unresearched when unresearched. Never leave it out and never guess

Approach

Where to find them and how they prefer to be reached. A call or a note, a lunch or a letter, an intimate gathering or a full house. The most actionable slot, it is how you design the next move. Never the address or number itself

Open the PAPPA guide

Use the Supercharged Contact Report

Supercharged Contact Report

Donor visit worksheet

Adapted for a one-to-one visit from Anne Murphy's original fillable report. Use initials or a nickname. Leave out addresses and phone numbers. Record what the donor said in the space beside each field.

Visit date and participants

Purpose of this meeting

People	People — family, colleagues, board ties, and others mentioned.
Purpose	Passion — the donor's priorities and interests, in the words they used.
Advisors	People — legal and financial advisors involved in decisions.
Assets	Assets — stated giving history, resources, experience, and influence.
Communication Preferences	Approach — where to find them and how they prefer to be reached.
Real estate and holdings mentioned in notes	Property — what they own. Use "Unresearched" when it did not come up.

Open questions or concerns

What we agreed to do, who owns it and by when

Open the original fillable report
Download the Template and Guide
Read the full Supercharged Contact Report
Use the follow-up action log

Donor meeting follow-up

Before you leave, agree on the next step, who owns it and when it will happen. Ask “How do you like to be reminded?”

Send the recap within 24 hours

Use the donor’s own words for what mattered to them. Include only the commitments you made together. If you didn’t settle on a date or a way to get in touch, ask what works for them.

Subject [Resource or next step] from our conversation

Hi [first name],

Thank you for [specific thing]. I especially appreciated hearing [what they told you, in their own words].

Here’s the [resource] you asked for. [Link or attachment and a sentence about the question it answers.]

I’ll [your agreed action] by [date]. You mentioned you would [their agreed action] by [date].

I’ll [call, email or write] on [agreed date] about [specific next step]. Did I miss anything you want me to include?

Warmly,
[Your name]

If the next step is still open

“Could you indicate when/how you'd prefer me to follow up?” Listen for a channel, timing and any decision the donor wants to make first. Use what they tell you to set the reminder.

Use the follow-up action log

Follow-up action log

Block time on your own calendar for follow-up. If you met with a colleague, debrief together and agree on who will do each piece.

Example of an agreed follow-up

A donor asks for the scholarship criteria and invites a check-in after a family conversation. They prefer email and agree to one reminder.

Action	Owner	When	Channel / result
Recap the visit and confirm the plan.	Gift officer	Within 24 hours	Email the donor.
Verify the criteria and send the one-page summary.	Program lead, then gift officer	By Thursday	Send the summary by email.
Ask what came up in the family conversation.	Gift officer	The following Friday	Email. If plans changed, agree on a new date.

Your next steps

Donor initials or nickname _____ Visit date _____

Action	Owner	When	Channel / result

Who else needs an update, and from whom?

If the donor asks for more time, record when they want to reconnect. If they ask you to pause, close the reminder.

Return to the donor questions

Donor Conversation Cheat Sheet

Choose three to five questions. Follow the donor's answers—not a script.

Open the full question and listening index

Ask	Listen for
Tell me about the first time you experienced philanthropy.	Who gave, who received, and what the experience meant to the donor.
What did that mean to you?	The words the donor uses to explain why the story still matters.
Would it be helpful to bring someone else into the conversation?	Who needs to hear the idea or weigh in, and who should invite them.
Are you ready to move forward?	The step they are willing to take, the question they still have, or a request for more time.
How do you like to be reminded?	Their preferred channel and timing. Confirm those details before you leave.

Your Meeting Plan

Desired outcome

Three questions I will prioritize

What I need to learn

Agreed next step / owner / date

PAPPA Supercharged Contact Report Donor Meeting Follow-Up

Question and Listening Index

Start with what you need to learn. Pick a question from that page and listen for the detail the donor wants you to understand.

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Meeting plan PAPPA Contact report Donor meeting follow-up

What You're Listening For

Donor Visits 2.0 gives you five things to listen for across a conversation. Use the donor's own words when you write the contact report.

People	Who comes up by name? A teacher, a partner, an old friend, a volunteer leader. Listen for the part that person played and whether the donor wants them in this decision.
Purpose	What does the donor want to change? Listen for hopes, fears, what they've already tried, and what hasn't worked yet. Keep the words they use to describe the outcome.
Advisors	Do they have legal and/or financial advisors? Listen for who provides advice, who decides, and what information the donor wants to take back. Confirm before contacting anyone.
Assets	How does the donor say they might support this work? They may name a gift, time, expertise, an introduction, or a giving vehicle. Record amounts and timing only when the donor gives them.
Communication preferences	How do they prefer to receive information — email, printed materials, face-to-face? Would they engage with a long proposal or a short summary deck? Note who they want to hear from and what topics they would like to avoid.

When you write the report, use Passion for purpose. Put advisors under People. Keep Property for holdings the donor mentioned. Use Approach for their preferences and the next step.

Open the PAPPA framework

Open the contact report

Question and listening index

Before You Meet

These are questions for the fundraiser. Use them to prepare your attention and choose an anchor question for this meeting.

Ask yourself	Notice
When did you first see someone give something away as a gift?	Whose example shaped your definition of generosity.
When have you been the beneficiary of someone's philanthropy?	What it felt like to receive help and what you remember about the giver.
What preconceived notions do you have about donors?	An assumption to set aside. Write down what the donor has actually told you.
How do you feel when you think about asking for money?	A feeling that might make you rush the question, fill the silence, or avoid the topic.
What do you already know about this person's giving history, affiliations, family, and interests?	What you can document, who gave you the information, and which details may have changed.
What do you want to learn today? Not what you want to say. What you want to learn.	The gap in your understanding that the donor is best placed to fill.
If the conversation goes sideways, what is the one thing you most need to find out?	One question you can return to even if your time together is short.
What would a successful meeting accomplish?	An outcome that leaves the donor and your team clear about what happens next.

Question and listening index

Donor meeting follow-up

Start With the Donor's Story

Ask the opening that fits the person. Let them finish the story before deciding which detail to follow.

PAPPA · Passion · People

Ask	Listen for
Tell me about the first time you experienced philanthropy.	Who gave, who received, and why this is the story the donor remembers first.
Tell me about the first time you experienced philanthropy — or saw someone make a difference in your community.	Someone may remember a neighbor lending time or a family receiving help. Use their sense of what counts as giving.
Who gave? Who received?	The roles each person played. The donor might have given, received, watched, or learned about the gift later.
Was it a family member, a friend, a neighbor, or an organization?	The relationship behind the gift. Keep the name or description the donor uses.
What happened, and what did it mean?	The moment they single out and what changed for them afterward.
How did that influence your giving today? (or your plans to give)	A connection the donor makes between that first experience and a choice they make now.
What would those people think if they knew about this amazing gift you're considering?	Whose opinion matters and why. Use this follow-up only when the donor has described a gift they are considering.
What would those people think if they knew about the gift you're considering?	The person whose opinion comes to mind and what the donor hopes that person would recognize in this gift.

Question and listening index

Donor meeting follow-up

Get to Know the Person

Follow the personal detail the donor chooses to share. A hobby or a family story can matter to the relationship in its own right.

PAPPA · People · Passion

Ask	Listen for
What do you do for fun?	An activity they make time for, who shares it with them, or a place they return to.
Are you working on/doing/etc anything exciting?	A project they are eager to explain. Notice their role and what they find satisfying about it.
You must be so proud of your family. Tell me more about them!	The people they name and how they describe the relationship. Use this invitation when the donor has already expressed pride.
You must be so proud of your family! Tell me about them!	Who shows up in their stories and what they enjoy doing together. Let the donor choose how much to share.
Have you had a chance to travel or visit with friends/family this year?	The visit, place or relationship they wanted to make time for. Record financial commitments only if the donor describes them.
Tell me about your family.	Family responsibilities, changes, and any effect the donor describes on their giving.
Have you had a chance to travel or spend time with family recently?	How the donor spends time, whom they spend it with, and which commitments shape their calendar.

A vacation or an adult child's occupation does not establish what a donor can give.

Question and listening index

Donor meeting follow-up

Motivation, Priorities and Legacy

Stay with the cause, place or people the donor names. Their reasons for giving elsewhere can help you understand what they value here.

PAPPA · Passion · People

Ask	Listen for
What are your hopes and dreams for [our students, our school, etc.]?	Who they hope will benefit and what they want that person's experience to be.
What are your hopes and dreams for our students/research/etc?	A change they would recognize in students' lives or in the work itself.
To what extent do you believe that ____ is a serious problem?	How urgent the issue feels to them, what leads them to that view, and where they disagree.
How important is it to you to leave a legacy?	What legacy means in their own words. It might be a family tradition, a lasting program, or an idea they want to pass on.
I saw that you made an amazing gift to [wherever]. What inspired that? I'm so curious! Tell me everything.	What prompted that particular gift. Listen for a person, a moment, or a result that made them act.
I saw you made an amazing gift to XYZ! What inspired that! Tell me everything.	The reason they chose to give then. If they describe how they funded it, distinguish that from why they gave.
What are your hopes and dreams for the future of your community — or the world?	The change the donor hopes to see, who it would reach, and why it matters to them.
How important is it to you to leave a lasting legacy?	Whether leaving something that lasts matters to them and what they hope will continue.
I saw that you made a meaningful gift to [organization]. What inspired that?	What moved them to act and what they valued about that organization or opportunity.

Question and listening index

Donor meeting follow-up

How the Donor Sees the Issue

Start with the issue itself. A donor may care about the same community and have a different idea about what would help.

PAPPA · Passion

Ask	Listen for
What experiences have shaped how you think about this challenge?	The firsthand experience, person, or event that shaped their view.
Do you believe individuals or communities can drive meaningful change?	Where they think change begins and whom they trust to lead it.
Have you seen examples of change that inspired you?	A specific example and the feature of that change they found meaningful.
What role do you think access, education, or proximity plays in addressing this issue?	Which barriers they see, who faces them, and what they believe would help.
How do you see the future evolving over the next decade?	The changes they expect over ten years and what they most want to see happen.
What gives you hope about progress in this space?	People, efforts, or signs of progress that give them confidence.
Have you visited organizations or communities doing this work? Would you be open to doing so?	Where they have been, what they learned there, and whether a visit would interest them.

Question and listening index

Donor meeting follow-up

What a Satisfying Gift Looks Like

A donor can care deeply about a mission and want a different result from the one you had in mind. Give them room to describe success.

PAPPA · Passion · Assets · Approach

Ask	Listen for
Are you someone who wants to change an individual life, impact a whole community, or make a difference on a global level?	The scale they choose and the example they give. A personal story may explain the choice better than a label.
What factors do you consider when you make an investment of any kind?	The criteria they use, the evidence they trust, and any questions they want answered before deciding.
What's the most satisfying giving experience you've had so far? What did you enjoy about it?	The part that made it satisfying. It could be the outcome, their involvement, or how someone followed up.
Are you someone who wants to change an individual life, impact a community, or contribute at a broader scale?	Whether they picture one person, a community, or a change on a larger scale.
What factors do you consider when deciding where to invest philanthropically?	The criteria they actually use and which one carries the most weight.
What is the most satisfying giving experience you've had? What made it feel that way?	The gift they remember and the part of the experience they want to repeat.

Question and listening index

Donor meeting follow-up

How the Donor Wants to Be Involved

A donor can care deeply about a mission and want a different result from the one you had in mind. Give them room to describe success.

PAPPA · Passion · Assets · Approach

Ask	Listen for
How do you like to be involved with the organizations you support?	A role they would enjoy and the time they want to give. Notice if they prefer to stay in the background.
Do you support special initiatives? Does a campaign motivate you? Do you enjoy making gifts on a set schedule?	Whether a particular project, campaign moment, or regular giving schedule suits them, and why.
Now that you've [done whatever thing], may I ask you how you see yourself making an impact? Do you envision playing a role here?	The role they picture for themselves. A wish to help may mean volunteering, advising, introducing someone, or making a gift.
How do you like to stay involved with the organizations you support?	The kind of involvement they enjoy and how often they want contact.
Do you respond to special initiatives or campaigns? Or do you prefer ongoing, recurring giving?	Whether they like a defined campaign, a recurring commitment, or a mix.
Now that you've had these experiences — how do you see yourself making an impact going forward?	The role they want next and what they want that contribution to accomplish.

Question and listening index

Donor meeting follow-up

How the Donor Chooses to Give

Listen for how they choose an organization, compare opportunities, and decide whether a gift did what they hoped.

PAPPA · Passion · Assets · Approach

Ask	Listen for
How do you see the role of philanthropy in addressing complex challenges?	The role they think giving can play and what they expect others to contribute.
Have you supported other organizations in this area? What has that been like?	Which organizations they supported, what worked, and what they would change.
What attracts you to certain types of organizations over others?	The organizational qualities that earn their attention or trust.
Do you believe local solutions are more effective than broader systemic approaches?	Where they think a gift can make a difference and why they prefer that scale.
What has your experience been with transparency and accountability from the organizations you support?	What updates they valued, what information was missing, and how that affected trust.
Are you more drawn to funding specific programs or building overall organizational strength?	Whether they favor a defined program or investments that strengthen the whole organization.
How do you measure success in your giving?	The evidence they look for when deciding a gift has achieved its purpose.
Do you prefer seeing immediate results, or are you comfortable investing in long-term outcomes?	How soon they want to see progress and what would sustain their confidence over time.

Question and listening index

Donor meeting follow-up

How Giving Decisions Get Made

Find out how a decision gets made and who needs information. Ask before including someone else in a conversation.

PAPPA · People · Approach

Ask	Listen for
How do you involve your family in your decision-making about giving?	Who discusses an idea, who decides, and what the donor wants to bring back to the family.
How do you involve your [family/spouse/kids] in your decision-making about giving?	Which relationships the donor wants included and how each person participates.
How do you and your family make your giving decisions?	The order of steps, whether the family meets to decide, and how the donor knows a decision is final.
How does your family make decisions about philanthropy?	Their usual process and whether this gift would follow it.
Do you have a trusted advisor you work with?	The advisor's role, when they are consulted, and whether the donor wants help preparing information for them.
How do you involve your family or others in your decision-making about giving?	Who takes part, who makes the decision, and what each person needs to know.
Do you have a trusted advisor you work with — a financial planner, attorney, or someone else?	Whether an advisor is involved, their role, and when the donor wants to consult them.

Question and listening index

Donor meeting follow-up

Who Else to Include

Find out how a decision gets made and who needs information. Ask before including someone else in a conversation.

PAPPA · People · Approach

Ask	Listen for
Would it be helpful to bring someone else into the conversation?	Whether the donor wants another person present, for what purpose, and who should invite them.
Would it be helpful to bring [whoever] into the conversation? Tell me…what would that look like?	What that person needs to hear, whether a joint meeting would help, and how the donor wants to arrange it.
Would it be helpful to have XYZ in the conversation?	Whether the person named has a part to play and whether the donor wants an introduction or would rather speak with them first.
Would it be helpful to bring someone else into the conversation? What would that look like?	Whom the donor wants to include, how they would like that person involved, and what information would help.

Resources, Timing and Capacity

Ask about the resources a donor chooses to discuss. Attribute amounts, ownership, restrictions, and timing to the person who supplied them.

PAPPA · Assets · People · Property · Approach

Ask	Listen for
How do you and your family fund your philanthropic goals?	A giving vehicle, schedule, or decision process the donor identifies. Note any limit or timing consideration in their words.
How is the economy affecting your business/family/life?	A change the donor says affects their plans. Ask what it means for timing before drawing a conclusion about a gift.
Do you serve on any non-profit boards? Tell me about your experiences!	Their role, any giving expectations they mention, and what board service has taught them about fundraising.

Question and listening index

Donor meeting follow-up

Resources, Timing and Capacity · continued

Ask	Listen for
Do you serve on any nonprofit boards? Tell me about that!	A leadership or advisory role, other commitments, or an approach they appreciated enough to describe.
How is the broader economy affecting your business, your family, or your life?	How they describe changes in their circumstances and any effect on the timing or flexibility of a gift.
Do you serve on any nonprofit boards? Tell me about that experience.	Their board role, familiarity with major gifts, and experience giving or asking others to give.

If the donor mentions land, a business, or a building, record exactly what they said under Property. Ownership, value, and willingness to give are separate facts.

Legacy and Family

Use these questions when the donor wants to talk about family, values, or what they hope will outlast them.

PAPPA · Passion · People · Approach

Ask	Listen for
How do you talk with your family about giving?	Who starts those conversations, what they talk about, and whose views they seek.
Would you like your family to be involved in your philanthropic decisions?	Who they want involved, in what role, and whether the decision is still theirs alone.
What kind of legacy do you want to leave?	The people, values, or work they hope will endure and how they describe that legacy.
Have you considered including organizations in your estate planning?	Whether they have considered a charitable estate gift and if they want to discuss it further.
What would you want future generations to understand about your values and commitments?	The values they want remembered and the stories or commitments that express them.

Question and listening index

Donor meeting follow-up

Connections and Introductions

A name tells you who matters to this donor. Agree on whether and how to involve that person before approaching them.

PAPPA · People · Assets · Approach

Ask	Listen for
Who else in your network cares about these issues?	People they name, what each person cares about, and how they know them.
Are there others you think we should know — people doing interesting work in this space?	People doing relevant work and the reason the donor thinks you should meet.
How do you typically learn about organizations you want to support?	The people, places, or experiences they trust when discovering an organization.
What role do you play in influencing the giving of people around you?	How they share ideas about giving and whether others come to them for advice.
Would you be open to making an introduction?	Whether they are willing to introduce someone, to whom, and how they prefer to do it.

Follow the Story

A second question is often more revealing than a new topic. Use a short prompt, then wait.

PAPPA · Passion · Approach

Ask	Listen for
Can you say more about that?	The detail they add without prompting. It often tells you which part matters most.
What did that mean to you?	Their interpretation of the experience. Capture their words before adding your own impression.
Tell me what that was like?	A concrete moment, a feeling, or something that surprised them.

Question and listening index

Donor meeting follow-up

Follow the Story · continued

Ask	Listen for
Tell me how that came about?	The sequence of events and the people or circumstances that influenced the decision.
Tell me more about that.	The detail the donor chooses to add when you leave the direction up to them.

Don't ask a question—just be quiet. Give people space to think.

Check Your Understanding

A second question is often more revealing than a new topic. Use a short prompt, then wait.

PAPPA · Passion · Approach

Ask	Listen for
Did you resonate with that? Can you say more about that?	Which part connected and which part missed. A correction tells you where to take the conversation.
Do you resonate with that?	Agreement, a reservation, or a different way they would explain the idea.
If you had one more thought to share on this topic, what would it be?	The point they saved for last, an overlooked concern, or something they wish you had asked.
Did I answer your question?	What remains unclear and what kind of answer they still need.
If we were to continue working together, what would success look like a year from now?	The outcome and time frame the donor would use to judge progress. Use their own description in the follow-up.

Question and listening index

Donor meeting follow-up

Check Your Understanding · continued

Ask	Listen for
Did that resonate with you?	What connected with them, what missed, and why.
If you had one more thought to share, what would it be?	The issue, hope, or question they want to leave with you.

Don't ask a question—just be quiet. Give people space to think.

Business and Family Conversations

Use the context the donor has shared. Choose an opening that gives them room to describe their own experience.

PAPPA · Passion · People · Approach

Ask	Listen for
Business Leaders	
How do you see this issue affecting the broader environment in which you operate?	The effect they see on employees, customers, or the community around their business.
What role should the private sector play in solving this?	What they believe businesses can contribute and where they see a role for their own.
How does supporting this work align with your values as a leader?	The leadership value they name and the connection they see to this work.
Parents and Grandparents	
What kind of future do you want for the next generation?	The opportunities or conditions they want children and grandchildren to inherit.
How do you talk with your family about responsibility and values?	The values they discuss at home and how they pass them along.
What would meaningful progress look like to you in your lifetime?	The change they hope to witness and what would convince them it has happened.

Question and listening index

Donor meeting follow-up

Faith, Values and Emerging Philanthropists

Use the context the donor has shared. Choose an opening that gives them room to describe their own experience.

PAPPA · Passion · People · Approach

Ask	Listen for
Faith-Motivated Donors	
How does your belief system inform how you give?	The belief or practice they connect to giving and how it guides their choices.
What does service or stewardship mean in your tradition?	How they define those terms and which responsibilities follow from them.
How do you see your personal values shaping broader change?	A value they act on and the wider change they hope it can support.
Younger Donors and Emerging Philanthropists	
What drew you to this issue?	The experience, relationship, or concern that first brought them to the issue.
How do you see your generation contributing differently than those before you?	Where they see continuity or change across generations and what they personally want to contribute.
What would success look like over a ten-year horizon?	The outcome they want in ten years and the signs of progress they would look for along the way.

Question and listening index

Donor meeting follow-up

Arts Centers and Libraries

Use the mission-specific wording that fits the donor and the place you are discussing.

PAPPA · Passion · People

Ask	Listen for
Arts centers	
What are your hopes and dreams for the role of art in this community?	The role they want art to play locally and who they hope will benefit.
What is the most meaningful experience you've had with an arts organization?	The work, person, or experience that stayed with them and why.
How would you like to see people experience this place in the future?	Who they picture using the space, what that experience would feel like, and what would make it possible.
Libraries	
What role has a library played in your life or your family's life?	The branch, person, or service they remember and what it made possible for their family.
What do you hope this library makes possible for the next generation?	What they want young people or families to be able to do at this library.
What would a stronger library mean for this community?	The local need they think the library could meet and what a difference would look like.

Parks, Aquatics and Recreation

Use the mission-specific wording that fits the donor and the place you are discussing.

PAPPA · Passion · People

Ask	Listen for
Parks and open spaces	
Which public spaces have mattered most to you?	The place they return to, who they go with, and what they value about being there.
What do you hope people will be able to do here that they cannot do today?	The activity or access that is missing today and the people affected by that gap.

Question and listening index

Donor meeting follow-up

Parks, Aquatics and Recreation · continued

Ask	Listen for
What would you want your family to experience in this place years from now?	The experience they want to pass on and what about this place matters to their family.
Aquatic and recreation centers	
What role have swimming or recreation spaces played in your life?	A first swim, a lesson, a team, or another experience they choose to share, and what it meant.
What opportunities should every family in this community be able to access?	The opportunity they want within reach and any specific barrier they identify.
How would you like this facility to serve future generations?	What they want families to be able to do here over time and how they would recognize success.

Discovery and Cultural Centers

Use the mission-specific wording that fits the donor and the place you are discussing.

PAPPA · Passion · People

Ask	Listen for
What experience first made you curious about this place or its history?	The object, story, visit, or person that first caught their attention.
What do you hope visitors discover here?	What they hope visitors understand or remember after they leave.
What would it mean to preserve and share these stories with the next generation?	Whose stories they hope will endure, who should help tell them, and who they hope will hear them.

Question and listening index

Donor meeting follow-up

Listen for Readiness

Use these observations from The Donor Conversation Guide to decide what to ask next. Confirm your reading with the donor before recording a commitment.

The donor may be ready	Give the decision more time
Talks about when rather than if	Consistently avoids discussing capacity
Asks specific questions about how funds will be used	Defers decisions across multiple meetings
Wants to know about implementation details	Focuses more on recognition than impact
Mentions giving ranges or asks about gift sizes	Returns repeatedly to overhead or administrative costs
Asks about recognition opportunities	Compares your organization unfavorably to others
Expresses a sense of urgency	Shows limited curiosity about the work
Wants to bring others into the conversation	Focuses primarily on tax implications
References long-term planning or legacy thinking	Expresses skepticism about nonprofit effectiveness in general
Asks about next steps	Asks about exit strategies

Are you ready to move forward?

Question and listening index

Agree on the Next Step

Clarify what each person has actually agreed to. Let the donor choose a time and a way to reconnect.

PAPPA · People · Approach

Ask	Listen for
Should anyone else be there?	Who needs to be in the room, what they can contribute, and who will invite them.
Is there anyone else who should be in this convo?	Someone whose input is missing before the next decision.
Are you ready to move forward?	What “forward” means to them, what they can agree to now, and what still needs a conversation.
Has anything changed?	New information, a competing commitment, or a different time frame. Leave room for a change of mind.

Follow Up When Plans Change

Clarify what each person has actually agreed to. Let the donor choose a time and a way to reconnect.

PAPPA · People · Approach

Ask	Listen for
What can we clarify in order to move forward?	The specific question still open and who can answer it.
When is a good time for us to circle back?	A date, a decision point, or a request for more time. Record the timing they give you.
I sense you may have some trepidation. How can I help?	Whether your impression is accurate. Let the donor name the concern or correct your reading.
How do you like to be reminded?	The channel, frequency, or person they prefer for reminders. Put that preference in the contact report.

Question and listening index

Donor meeting follow-up

Follow Up When Plans Change · continued

Ask	Listen for
How would you like to be reminded?	The reminder the donor welcomes: a text, a call, an email, or a note through someone they trust.
Could you indicate when/how you'd prefer me to follow up?	The timing and channel the donor chooses for this particular next step.
Would you like to speak with another donor, a colleague, a board member, or the school head?	The perspective they want and whether they give permission for an introduction.

Notes to Carry Into the Contact Report

What the donor said, in their words

What I still need to confirm

Agreed next step, owner and date

Question and listening index

Donor meeting follow-up