

Discovery Meeting Questions

Welcome/Introduction

- Thank you for your past support!
- How are you/things going at the foundation/company?
- Can you tell us about your charitable giving priorities?

Organization/Project Overview

Discussion of Gift

- Is this a project that would be of interest to the trustees/company leadership/you and your family?
- We've noticed you are a committed supporter of ANOTHER NONPROFIT IN TOWN. How did that partnership develop?
- What motivates your decisions: HR or PR?
- How can we strengthen our request to you?
- How are decisions made about funding? Who is involved in that process?
- What is the process to apply?
- Do you have deadlines that we should be aware of?
- Is there a deadline that you recommend we target for our request?
- Do you have any guidance on a reasonable gift range for this project?
- Gifts can be made over a multi-year period – is that preferred?
- Would a naming opportunity be of interest?
- Is there anyone else who should be included in follow up from us?

Summarize Action Items

- Are there any additional materials or information you would like to see?
- What are your preferences for updates moving forward?
- How would you like to receive updates before our formal proposal is submitted?

Closing

- Thank you for sharing your time and insights today!