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**The 66 Donor Data Points We Need To Know**

**Date:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Last Updated:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**By:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**DONOR**

1. Name

Nickname

Title

1. Company name and address
2. Home address
3. Telephone:

Business

Home

1. Birth date

Place of birth

Hometown

1. Height

Weight

Outstanding physical characteristics (e.g., balding, great condition, arthritis, severe back problems, etc.)

**EDUCATION**

1. High school and year

College

Graduated when

Degrees

1. College honors

Advanced degrees

1. College fraternity or sorority

Sports

1. Extracurricular college activities
2. If donor did not attend college, is he/she sensitive about it?

What did they do instead?

1. Military service

Discharge rank

Attitude toward being in the service

**FAMILY**

1. Marital status

Spouse’s name

1. Spouse’s education
2. Spouse’s interests/activities/affiliations
3. Wedding anniversary
4. Children, if any, names and ages

Does donor have custody?

1. Children’s education
2. Children’s interests (hobbies, problems, etc.)

**BUSINESS BACKGROUND**

1. Current Employment

Company

Location

Dates

Title

1. Previous titles and companies
2. Any “status” symbols in the office? (art, evidence of luxury travel, relationships, etc.)
3. Professional or trade associations

Offices or honors in them

1. Any mentors?
2. What relationship does he/she have with your organization?
3. Is it a good relationship? Why?
4. What other people at the organization besides you know the donor?
5. Type of connection

Nature of the relationship

1. What is client’s attitude toward his/her company?
2. What is his/her long-range business objective?
3. What is his/her immediate business objective?
4. What is of greatest concern to the donor at this time: the welfare of the company or his/her own personal welfare?
5. Does the donor think of the present or the future? Why?

**SPECIAL INTERESTS**

1. Clubs or service clubs
2. Politically active?

Party?

Importance to donor

1. Active in the community?

How?

1. Religious faith tradition?

Active?

1. Highly confidential items NOT to be discussed outside of the donor relationship (e.g., divorce, illness, member of AA, etc.)
2. On what subjects does donor have strong feelings?

**LIFESTYLE**

1. Medical history (current condition of health)
2. Does donor drink?

If yes, what and how much?

If no, offended by others drinking?

1. Does donor smoke?

If no, object to others?

1. Favorite place for lunch
2. Favorite place for dinner
3. Favorite items on the menu
4. Does donor object to having anyone buy his/her meal?
5. Hobbies and recreational interests

What does donor like to read?

1. Vacation habits
2. Spectator-sports interest: sports and teams
3. Kind of car(s)
4. Conversational interests
5. Whom does donor seem anxious to impress?
6. How does he/she want to be seen by those people?
7. What adjectives would you use to describe donor?
8. What is he/she most proud of having achieved?
9. What do you feel is donor’s long-range personal objectives?
10. What do you feel is the donor’s immediate personal goal?

**THE DONOR AND YOU**

1. What moral or ethical considerations are involved when you work with the donor?
2. Does donor feel any obligation to you or your organization? If so, what?
3. Does the proposal you plan to make him/her require the donor to change a habit or take an action that is contrary to custom?
4. Is he/she primarily concerned about the opinion of others?
5. Is he/she very self-centered or highly ethical?
6. What are the key problems as donor sees them?
7. Can you help with these problems? How?
8. Does your competitor have better answers to the above question than you have?

66. Additional notes?