

## **Research Request “Reference Interview”**

### Examples of Questions

When do you need this research? (do not accept “whenever” or “ASAP” – negotiate a date)

Where did the information the development officer is giving you on the prospect come from (from the prospect at an event? from a trustee? from a news article?)

Have you looked at the prospect’s record in Pledgemaker?

Have you done any preliminary research on the prospect? (Google, etc.)

Have you (or anyone else) already met with this person? Do you have a meeting scheduled? What is the date of the meeting? Who will be there?

Is this the correct spelling of the person’s name?

How did this prospect come to your attention? (Event? Referral by trustee or other volunteer? News article?)

Try to find out what questions the development officer is trying to answer: (is the prospect philanthropic? is this major gift prospect? what should the ask amount be? who is this person, generally?)

Tell me everything you know about this prospect. Do you know where they work, or in what industry? Do you know where they live? Do you know of connections to other donors, volunteers, alumni?