

X Organization Donor Focus Group Protocol
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Background and Introductions:

1. Welcome and thank you.

Story of the founding of X Organization

Introduction of the moderator - affiliation, independent.

Distribution of donation card.

2. Show of hands:

Have you ever contributed to a:

- A local school? Any school?
- A local camp? Any camp?
- To build a local building? Any building?
- To build a local museum? Any museum?
- To support a local arts and ideas series? Any arts and ideas series?
- To support a local charity fund? Any charity fund?
- To support a local environmental organization? Any environmental organization?
- A local political group? Any political group?
- In memory of someone?
- In honor of someone?

3. Session Introduction

Purpose of Session. The X Organization is working to *increase interest, awareness and participation in our organization.* We are talking to several groups of community volunteers, some who are involved with X Organization, and others who are not.

4. Participants - Personal Introductions.

General/Demographic

- How long have you lived in the Elm Village area, and in which town do you currently live?
- Do you have any school-aged or adult children living in Elm Village? In other parts of the state?
- Current or most recent profession.

Volunteerism and Donations

- Mention any local organizational affiliations; or regular volunteerism.
- Mention any specific local charitable giving initiatives that you have been involved with, either in the past or currently. (If not local, then national/world.)

Philanthropy/Giving

5. Heritage Stories.

I want to start by asking you to tell me any kind of a story that you might have heard while growing up from your parents or grandparents about volunteerism or charitable donations. I'm most interested in hearing stories about local community giving.

6. Importance.

In general, how important is the tradition of volunteerism and philanthropic giving to you? (Give some leeway to discuss volunteer work, but focus on financial giving.)

7. Your Heritage of Giving. *(If have children).*

Have you discussed this with your own family, and, if so, in what ways?

8. Annual Giving.

What are your 3-top priorities for yearly giving, and what led you to these choices? (i.e., 'the spark.')

9. Bequests -- "Legacy gifts" -- "Planned Giving."

- a. Do you have any long-term bequest to support your favorite charities? (e.g., endowment funds, gift of annuity or charitable trusts.)
- b. Is that favorite charity (see above) built into your will?

10. Connection to Elm Village, and Importance of Giving Locally.

- a. In general, how connected do you feel with the local community?
- b. and how has this affected your giving priorities?
- c. Do you feel it is important for *none*, *some*, or *all* of your giving to be for local causes or initiatives?

Awareness (and Education about) the X Organization

11. Quick Review of Facts

- a. Show posters, photos
- b. Preview clip of new website

12. Conversation about Participants' Awareness of Facts

Communications

13. Staying Connected.

What are some of the ways that you stay connected to the various causes that you contribute to? (Attend events, read donor reports, read newsletters/magazines, volunteer, other)

14. Frequency of Connection.

With what frequency do you attend programs of interest at your top 3 organizations? 1x year; 2x year; Monthly meeting, other?

15. Type of Preferred Communication.

We are all busy. What is the best way for you to learn about programs offered by the X Organization?

- Regular general email, Periodic Email
- Targeted Email just for your interests
- Email newsletter
- (Paper) U.S. Mail: postcards, newsletters, flyers
- Newspaper ads and articles
- Facebook group, twitter, or other social media
- Website - static, or with programmatic updates
- Phone calls
- Other

16. Pace of Notification.

- a. And how often would it be acceptable to you to receive notifications? (Weekly, only for special events, quarterly.)

- b. If you receive notifications electronically, what is the best day or time of day to receive them?

17. Ending Note

I want to end by asking you what words of wisdom you might impart to encourage or motivate other members of the Elm Village community or your own children to get involved with *local* charitable works, either via volunteerism or donations.