



ANATOMY OF AN ASK

One of the principal truths of fundraising is that if you do not ask for a gift, you will not receive one. In fact, studies have shown that the number one reason an individual does not give to an organization is because he or she has not been asked. And what is the most effective method of obtaining a major gift? Personal solicitation. A face-to-face ask is 10 times more effective than mail and 5 times more effective than a phone call.

Personal solicitation is both an art and science. As with most things, experience is the best teacher. The more you actually solicit gifts, the more comfortable and effective you will become. As fundraising guru Jerold Panas says “You don’t have to be great to start but you have to start to be great.” Below are a few guidelines or best practices to follow to help you hone your skills.

Best Practices:

- Know everything you can about your organization: mission, vision, values, future projects, strategic plans.
- Know your donor. Prior to the solicitation, arm yourself with as much information as possible about the donor. Read database notes and review paper files. Ask your CEO and board members what they know about the donor.
- In a perfect world, we would all have involved, active volunteer leaders to help with major gift fundraising -- thus, the old adage, “select the right person to ask the right person at the right time for the right amount in the right way for the right reason.” If you do not have active volunteer leaders, try not to let this philosophy get in your way. Sometimes the right person to ask is the person willing and able to do the job!

- If you do have active volunteer leaders, by all means ask them to participate in important solicitations. A peer-to-peer ask is a very powerful tool. Prior to the solicitation meeting, determine what role the volunteer will play and what role you will play. Make sure to plan who will actually make the ask.
- LISTEN. To be a good solicitor you need to be attentive, sensitive, thorough, thoughtful, responsive and respectful of the needs of the donor.
- Listen with a purpose, do not interrupt, provide feedback if appropriate.
- Be prepared for objections. Imagine the issues the donor might raise and come up with appropriate answers.
- If the donor is not receptive to the ask, gently probe for reasons. Is it the timing? Is the project not a good fit? Is it the amount of the ask?

Anatomy of an Ask

- Introduction/thanks for visit.
- Small talk. Be cordial but respectful of the donor's time.
- Purpose of visit.
- Case building.
- How the individual can help.
- How this action will achieve the mission.
- THE ASK. Ask for a specific amount or range.
- Be quiet. Let the donor absorb the information presented.
- If the donor needs time to think it over, set a clear time to follow up.
- Thank donor for his or her time.
- After the meeting, debrief with staff. What worked? What did not?
- Send a thank you note.
- Send any material that was promised.
- Follow up at agreed upon time.

Fundraising for an organization you hold near and dear to your heart is a valiant calling. It gives you the opportunity to ask individuals to invest in a meaningful cause and thus to make your community and even the world a better place.