The ASK ©
Jewish Community Foundation

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What We Want to Accomplish Today

- Think about what money means to you and what it means to the person you are asking
- Essential elements for any ask
- Exercise/Participation
- Making a Good Ask into a GREAT Ask
- Handling the responses
What We Want to Accomplish Today

- Following through with each ask
- Emphasize Asking for:
  - A bequest gift
  - A legacy (will, annuity, trust)
  - A Blend Gift – legacy + outright annual/major gift
What Does Money Mean to You?
What does $ mean

- Defines your quality of life
- Determines your success
- Determines if you get an education
- Determines where and how you live
- Determines when and if you can retire
- Governs how much you can own and borrow, In short – it’s every aspect of your life and those you love!
What “gets in the way” of the ASK

- Not knowing YOUR views on money
- Not knowing The Person Being Asked views on money
- Pressure to ask to make goals – personal or professional
- Blatant fear they will not like you
- Not knowing if the person is “ready” to be Asked
What “gets in the way” of the ASK

- Afraid to ask the people you know
- What if you ask for too much or too little?
- Shouldn’t someone with more authority/expertise do this?
- I’ll lose the person’s yearly gift if I ask for a larger gift or legacy gift?
- Is this economy conducive for gifts?
Essential elements for Any ASK

- Time Frame – 25 minutes
- Must script it out in writing and anticipate ALL reactions from the ugly, to not so good, to ok maybe, to YES!
- Warm up – 5 min
- Transitional phases and ASK – 6 min
- SILENCE
Essential elements for Any ASK

- The person being asked response – 10 minutes and your conversation
- The close and follow up – four minutes

*Remember – this is a Conversation not a Confrontation*
The Finishing Line – The Close

- Thank the person for their time
- Restate why there is a match between the gift opportunity and the person’s interest in your organization
- Remember – who/what is this benefiting?
- GET A DATE AND TIME when you will speak again about the ask
The Finishing Line – The Close

- Ask the person if they need additional information
- Speak with the person as though they WILL make the gift
- Stay positive no matter what the person says!
How to Handle Any Reaction

- ANTICIPATE any and all responses
- LISTEN to every word and stay positive
- Pay attention to the person’s body language and tone of voice
- Do not be overly aggressive or “over-talk the ASK”
- Confidence, passion and patience will lead to the gift!
Exercise Time

How do you know a person is more interested in a legacy gift; an outright gift; or both?

What signs/conversations do you see and hear to give you this indication?

Does AGE always drive whether to ask for a bequest, annuity, trust?
Exercise Time

You have just asked a prominent leader in your synagogue for a bequest and she says “I have to think about it”

- What do you say and what are you next steps?
Exercise Time

You and the head of your Hebrew high school ask an alumnus for a gift for the school’s endowment and he says “How do I know my money is safe and why do you need endowment if the board is supposed to make smart investment choices?”

What do you and the head of school say?
Exercise Time

You have been working with a donor who has been thinking about placing you in her will. She tells you she has been worried since September 2008 that she now fears she may outlive her investments and wants to “wait until the economy gets better”

What do you say and do?
The Follow Through With Each ASK

 › THE ASK WITHOUT THE FOLLOW THROUGH RESULTS IN NO GIFT!
 › What if the top person did the ask and now does not want to follow through?
 › Time – don’t allot more time for all your asks and less/equal time for the follow through – IT TAKES MORE TIME
The Follow Through with Each ASK

- How long do you stay with the person after he/she has been asked?
- How do you maintain communication if he/she won’t return calls/letters/e-mails?
- What system do you have in place to remind you to follow up?
# Laura’s Pipeline Chart

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Exercise Time

Tell me one thing you know now that you did not know before we started.

Tell me one thing you can go back tomorrow and change.
Laura’s “10 Guiding Principles to Any ASK”

- The more personal and sincere you are with the people you are cultivating, the quicker you will be able to make the ask;
- Every person must be treated separately and distinctly;
- Anyone asking for a gift must make their own gift first;
- There is no substitute for preparation right before the ask to review the person’s profile and the gift proposal;
- Consistent givers can and will make larger gifts;
Laura’s “10 Guiding Principles to Any ASK”

- Always use “we” instead of “I” in any ask. “We” connotes that the ask is being done with all the strength and backing of the institution;
- Any institution’s planned giving program must be coordinated with all fundraising programs;
- Every ask must be for a specific amount for a specific purpose;
- At the initial ask, stay committed to the ask amount; and
- The ask without the follow through will result in no gift.
Laura’s “10 Guiding Principles to any ASK”

- They work and don’t skip any!
- Put them by your office telephone or bulletin board
- Feel free to add your own!
- Share them with the people you work with and your boss
- Believe in yourself, what you do, who you do it for, who you do it with and…GREAT GIFTS WILL FOLLOW!
The ASK

The materials in this session have been derived from the best-selling books by Laura Fredricks:

- **THE ASK: How to Ask for Support for Your Nonprofit Cause, Creative Project or Business Venture** (Jossey-Bass 2010) and