

MAKING THE ASK

“Do’s and Don’ts”

Some Simple Do’s

1. Prepare. Know your donor. Know your mission. Know your goal.
2. Thank potential donor for taking time to meet with you.
3. Set the tone with comfortable conversation; catch up if you know the person
4. Talk about your organization and its mission, filling in the gaps from what you’ve previously discussed, and succinctly about the project for which you’re raising money
5. Discuss your own interest and involvement
6. If asked, share the amount you’ve contributed
7. Invite questions
8. Ask for the gift AND **be quiet**.
9. Thank the donor if she/he gives, or if not, set up a time for a follow up meeting
10. You have entered a relationship. Treat it as such. Thank them, and follow up with a handwritten thank you note. Make sure you stay in touch. Let them know how the gift is being used. Let them know what is on the horizon. Tell them of successes.
11. Let your MRO know that you’ve had the conversation if the Foundation can assist with Planned Giving, stocks, or non-traditional gifts.

Some Simple Don’ts

1. Don’t browbeat a donor. Don’t back down too easily, but accept a “no” gracefully.
2. Don’t con a donor. Your behavior is the best clue to the integrity of the institution. If this conversation lacks integrity, you will have lost the gift and the donor.
3. Don’t overstate the need or your level of participation
4. Don’t promise anything you can’t deliver
5. Don’t assume that because they have wealth that they are without concerns like health issues, children and their problems, stress at work or job insecurity, investment worries, etc. Listen if they tell you.
6. Don’t apologize for asking. You are committed to this; you are inviting others into a good thing.
7. After you ask for their gift, don’t be afraid of silence. Let the donor be the next person to speak.
8. Don’t let a gift, or a denial, be the end of the relationship.