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**What Do I Need to Know  
Before I Ask?**

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# 1

CHAPTER

## What Money Means to You and Why Ask?

**P**ERHAPS THE MOST IMPORTANT PART ABOUT asking for money is understanding *your views on money*. Note that I said your views, not how the person you are asking for money feels about money. So often we skip this very important step and dive right into identifying and learning as much as we can about the person or people we want to ask for money that we forget about getting in touch with our own feelings about money.

In this chapter I will go through the important exercise of exploring what money means to the asker because it is often the deciding factor between those who can ask easily and those who find it extremely difficult to ask. This is a very important psychological exercise that anyone asking for money needs to experience. It is essential that we explore our own values of what money means to us, and as importantly, why we feel we deserve to get what we ask for. This feeds directly into why many people hesitate and fear to make an Ask. This chapter will detail the most obvious reason why people hesitate and fear to make an Ask and will provide some creative solutions to overcome those negative factors that prevent an Ask.

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## WHAT DOES MONEY MEAN TO YOU?

The topic of money is almost certain to open a floodgate, releasing emotionally charged memories for many of us. Just say the word “money” and a series of visual images come to mind, ranging from childhood memories of the choices that had to be made within the family, to the current time and how one lives. I always open my training sessions with the question “What does money mean to you?” The surprised looks on many people’s faces say to me “Why does it matter?” It matters because if you have a positive attitude and outlook about money, then you know the positive transformational power it can bring to deserving individuals and causes, and it makes the Ask go smoothly. If money is viewed in negative terms, it becomes much more difficult during the Ask because these negative feelings can sabotage an Ask or make it extremely uncomfortable and unnatural when asking for money.

Here are some of the responses I received when asking people who want to learn how to ask others for money what money means to them:

Power	Selection	Responsibility
Freedom	Control	Giving
Choices	Independence	Love
Change	Education	Peace of mind
Opportunity	Security	

These are all very emotionally laden terms, and in preparing to ask for money, they do surface in the mind of the asker. I do not mean to suggest that if you grew up in a wealthy and comfortable household and money was never a problem, asking for money will be an easy task. This is not an issue of whether you grew up or currently possess an abundance, moderation, or lack of money. However, it is important to think about what money means to you right now.

Money can mean the following:

- It can define your stature in life.
- It can determine your success.
- It can be why you need to work and why you work where you do.

- It can determine when and if you can retire.
- It can set the parameters of what you can give to your loved ones now or in the future.
- It can make you reflect on whether you made the right choices in life.
- It can govern how much you can borrow.
- It can govern how much you will inherit.
- It can determine what and how much you can buy.
- It can govern what you do in your free time.
- It can determine where and how you live.
- It can be a factor in your selection of health care coverage.
- It can narrow, widen, or obliterate your vacation plans.
- It can play a positive or negative role in your relations with friends, colleagues, and business partners.
- It can influence other personal relationships.
- It can motivate you to be like others or to have similar things and similar lifestyles.
- It can govern how much you save.
- It can govern how much you can invest.
- It can govern how much you need to take out of your savings and investments to live.
- It can be a positive motivational factor in your life.
- It can determine how much you can give to charity.
- It can be a most stressful topic of conversation.

In short, money affects every aspect of your life, which is why it is so important to come to terms with how you feel about money and how it may influence your comfort level in asking for money.

On that note here is the first exercise:

Exercise #1: Write your own list of what money means to you and whether those feelings would help or hinder your ability to ask for money.

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Another very important issue to explore for any asker is “What is your first memory of when you knew it was important to give back and help those people or organizations in need?” I like to ask this question because everyone has a unique story to share about the first time they gave money or raised money. All too often fundraisers do not share enough about themselves personally with donors or those who have the capacity to support a cause or a business venture, and these stories tell a great deal about the character, integrity, and warmth fundraisers have regarding their professions. Since I asked you about your first memory, I shall share mine.

I was in sixth grade, at St. Matthews, Ridgefield, New Jersey, in Sister Mary Rita’s class. As with any Catholic grammar school, we sat miserably in alphabetical order (for six years Michael Fick sat in front of me and Carol Grinner sat in back of me!). Sister Mary Rita told us that, tragically, a church had burned down in Newark, luckily no one was hurt, and that we were to do “all that we can” to help raise money to help rebuild the church. Welcome to your first capital campaign, Laura. Sister told us that the eighth grade already raised \$62. This was sounding more and more like a challenge grant to me now. The person who raised the most money would receive something that was blessed by the Pope and it would have gold. Now to a sixth grader, if it was blessed by the Pope, this would surely be our “ticket to heaven,” and if it had gold in it, then it must be as big and blinding as the largest crucifix possible.

I had the bright idea of walking dogs to raise money. In sixth grade, I was all of four feet, two inches. I probably should have quit while I was ahead. I put a notice up in our local grocery store called the Co-op that said “will walk your dog for 25 cents” with my telephone number. I think I am really dating myself now. A short while later I received a telephone call from a distant neighbor who told me to come right away. I jumped on my green Sting-Ray bicycle with a leopard-skin banana seat (I thought I was very cool back then) and went to his home. I put the bicycle down and the neighbor opened the door. The only thing separating me from death was a screen door because there stood not one, but three Doberman pinschers, much larger than me and quite eager to go outside. I negotiated with him that it would be 25 cents per dog, and knew from that minute on I would be a very good attorney and sharp businesswoman some day.

After a few weeks of this dog-walking activity, I went to school with tons of quarters from my afterschool job of dog walking. Sister Mary Rita called us up one by one and of course counted what each of us had raised. You guessed it, I had won the prize. It was a pink plaque, with a postage-size “gold” inlay of Jesus. I sincerely hope it was blessed by the Pope at that time because I still have the prize and I am still very much counting on it to be my “ticket to heaven.” Many years later, here I am writing about how to ask for money. I firmly believe it all began way back then raising money for that church that burned down and all of us at St. Matthews and beyond who helped to rebuild the church and the community.

I share this story with you because each of you has one just like it. First and foremost, these stories are classic, touching, engaging, and it should fill you with confidence that you have wanted to help those in need for a very long time. Second, when and if appropriate, do share your story with those people that you are cultivating and asking for support. The more you share of yourself, the closer they are connected to you and the faster trust and a lasting personal relationship will be formed. Third, it makes the fundraising process so much more enjoyable. Why should you know everything about the people who may support you, your cause, or your business if they do not know your values, your dedication, your commitment, and your inspiration to raise money.

### 10 Things to Know About Any Ask—#1

Know your views on money and the importance of raising money before you ask for money.

#### WHY DO YOU HESITATE TO ASK?

It is extremely common and in some instances very easy to put off the Ask but it is very important to understand why people fear or hesitate to make the Ask. Exhibit 1.1 is a list of the common issues that can get in the way of the Ask. It is by no means exhaustive, but it does reflect the major reasons why people hesitate to ask.

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EXHIBIT 1.1. *Reasons Why People Hesitate to Ask.*

1. I don't know the person's views on money.
  2. I am not sure the person has that kind of money to give.
  3. I don't know if giving money is a positive or negative factor.
  4. Prospect research shows that the person has the assets to give, but why should he give his hard-earned, invested, or inherited money to our organization?
  5. I know the person supports other causes; why would she support ours?
  6. There are numerous groups that do similar work, so why should he support us?
  7. So many people recently have supported disaster relief efforts; what makes us think they will support us in the same way?
  8. What if the person feels insulted that we asked for money?
  9. What if I ask the person for too much or too little?
  10. If I ask her for money, she is going to ask me for money.
  11. How can I possibly ask a colleague, friend, or relative for money?
  12. What if she says no and never speaks to me again?
  13. I just know the person is going to ask me something I don't know. Shouldn't the organization president or CEO be doing this?
  14. Why can't I ask him for money in writing instead of meeting him in person?
  15. In this economy, isn't it insensitive to ask for money when many people have lost major investments and the stock market has been in a downward swing?
  16. I have an insurmountable fundraising goal that is highly unlikely to be met this year so why not do these Asks next year when we have a better chance of making our goal?
  17. Won't I lose the person's annual fund gift if I ask for a larger, major planned or campaign gift?
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Looking over this list in Exhibit 1.1, you will notice that some common themes pop up. The first theme is fear of not knowing the person you are asking for money well enough before making the Ask. The second is learning what makes one's organization or cause so special that people would elect to support it over other groups. The third is understanding why people would part with their money and having the confidence in making the Ask. The fourth is letting external forces and perceived internal problems postpone the Ask for a future time.

Identifying the most common fears and hesitations, as we have just done, is the first hurdle. Now we need to explore what we can do about them. The following are concrete solutions and exercises you can use to "get beyond" the psychological barriers that can make any asker worry himself or herself out of making the Ask.

#### *Know the Person You Are Asking Before You Make the Ask*

Essential to your success is knowing as much as you can about the person before making the Ask. Not knowing how the person was raised and the role that money played in that person's upbringing can make anyone hesitate to ask for money. People's views on money begin at home. How they were raised and the era in which they were raised can be the most important factors influencing their philanthropic giving. People who grew up during World Wars I and II or who lived through the stock market crash of 1929 often have "cautious spending habits" and hence a need to save (Nichols 2001, 43). Even though they may give to a charity, their priority is to save money so that everyone can be taken care of if something happens. People who are extremely religious are likely to tell you that they have always been taught to "give back" and "to help others in need." To them, giving is natural, it is expected, and they want to help others in any way they can. As long as they have the means to do so, they are more than willing to lend a hand to those less fortunate. If someone's parents, extended family members, mentors, colleagues, peers, or friends have supported a charity or several charities, there is a strong likelihood that this tradition will have been passed along, shared, and encouraged.

Conversely, people who have experienced major investments and economic losses such as the economic downturn that started in the fall

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of 2008, technology stocks and the dotcom fall of 2000 and 2001, or loss of a job at any time are likely to tell you that they need lots of time to recoup losses before considering giving money to a worthy cause or project. Such reasons illustrate that understanding how and when a person was raised can give you a greater insight into his views on money. This chapter opened with examining the asker's views on money; now it is time to learn about views of the person that you want to approach.

You find out people's views on money and how they were raised during the cultivation stages. Cultivation is everything you do up to the Ask (see Exhibit 1.2). It is the series of meetings, events, conversations, and exchanges of correspondence you have with the people you will eventually ask for money. This is the time when you really get to know these people, and in turn they build a long and lasting trust with you and with the organization's leaders and volunteers, or the business' executives and staff. Cultivation is essential before any Ask. While you are sharing information with the people you want to ask for money about your organization and business, its mission, goals, plan, leaders, finances, volunteers, and beneficiaries, you also have the golden opportunity to see, hear, and witness their lifestyle choices. You will know, for example, why they feel they are crusaders for controversial causes; why they sent their daughter or son to a certain school; where and when they vacation; how important religion is to them and their family; why they chose to have or not to have a family; why or why not it is important to volunteer for military duty; how they selected their career path; the importance and value of their cars, homes, second homes, and boats they have selected; how and why they volunteer; which charities they support; and why supporting your creative idea fulfills a dream for them. These things unfold naturally over time if you and others from your organization are passionate and diligent in building relationships with potential funders.

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EXHIBIT 1.2. *20 Cultivation Techniques.*

1. Calling the people you want to meet.
2. Meeting with these people at their homes, offices, or a restaurant.
3. Corresponding with them and sending e-mails if you have received approval.

4. Having the people meet the leaders of the organization, board, committee members, administrative officials, staff, and beneficiaries.
5. Giving prospects a tour of the group's facility.
6. Sending the people personal messages attached to the direct mail they receive from your group.
7. Sending the people holiday, birthday, congratulatory, sympathy, and anniversary cards.
8. Asking these people for advice on a particular subject that is important to your group.
9. Having beneficiaries call, write, or visit the people on a frequent basis.
10. *Inviting people to a small gathering of supporters and potential supporters so that they can learn firsthand the magic of your organization and the need for support now.*
11. Asking these people to host a reception, breakfast, lunch, or dinner gathering of select donors and prospects to promote the successes of the group or to inform donors and prospects about the progress of a project or program.
12. Asking people to volunteer for a special event committee, a standing committee, or advisory board.
13. Inquiring whether these people have contacts, colleagues, or friends who would be interested in finding out more about your group or project.
14. Drawing on peoples' writing or communication talents and asking them to write an article for your group's newsletter or magazine.
15. Sending these people newspaper and magazine articles on their interests, such as sports, theater, music, shopping, and literature.
16. Taking the people out for their birthdays or to celebrate some other special event.
17. Joining the people at a concert, play, race, game, hike, or walk when they extend an invitation to do so.
18. Featuring these people on your Web site or group's internal publications (with their permission).

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19. Inviting the people to give a speech, lecture, or workshop on their area of expertise to the group's beneficiaries, other potential supporters, administrators, or fundraising staff.
20. Having the leaders of the group periodically call, write personal notes, or e-mail people after they have met, just to keep the people informed about the group.

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Notice I emphasized number 10. I believe by far this is the greatest, most effective and efficient way to cultivate people to ask for money because it makes them feel special, selective, an insider, and very close to the top leaders and supporters of the organization. If you have a strong, likeable, and charismatic leader for your organization, I strongly suggest that you have her or him host a series of these small, intimate gatherings and follow through with each person as set forth in Chapter 8. This by no means suggests that the other 19 cultivation techniques in Exhibit 1.2 are not important and effective. It is just in my experience, particularly with groups with limited resources, that this is the best cultivation technique.

The easiest way to find out someone's views on money is to ask *open-ended questions* during cultivation such as the following:

*"Dan, of all the charities you could support, why do you support us?"*

*"Kyra, how did you first find out about us and what are you most interested in about our organization?"*

I sometimes think that we do what I call "fill in the blank" fundraising, that is, we *assume* we know why someone would want to support the organization or business venture. That can be a dangerous path because when you assume you know why the person may be interested in your organization it starts to become a self-fulfilling prophecy and you can waste precious time and resources cultivating a person towards a particular project, program, or idea when in fact their interests and motivation can be completely different from what you had in mind. Take the time to ask these simple open-ended questions and listen carefully, with full eye-contact, to what the person says. Then and only then will you have the accurate information you need

to cultivate the person in the direction of their interest, and you will be that much closer to making the right Ask.

*Every Organization Has Its Own Charm*

There are over 1.9 million registered charities in the United States (Independent Sector, Nov 7, 2008) and over 78,000 registered charities in Canada (Charity.com, 2008). All these groups are raising money for worthy causes—preserving wildlife, assisting people with handicaps, increasing literacy, reducing homelessness, improving child care, supporting international causes, funding the performing arts, improving education, making health care accessible, promoting research, and defending the environment, to name only a few.

With so many groups to support, fundraisers may wonder why someone would want to support one group over another. Generally, people who have this concern are brand-new to the field, just taking their first plunge into the fundraising pool. The answer to this question is that every organization has what I call its unique charm. It has something that separates it from all the other nonprofit groups and that draws in donors, volunteers, leaders, fundraisers, and administrators like a magnet. It could be that a certain group is taking care of the homeless in a select section of the city, that a theater conducts monthly workshops for children after school hours, or that the rivers are free from waste because a group successfully lobbied local government. Sometimes it is leadership that provides the magic, turning a group from nothing to a huge success. More often than not, it is the select group of beneficiaries the organization serves that makes the group unique and worthy of tremendous support.

Anyone who has concerns that the vast universe of causes might hinder any Ask should remember the following. As the asker, you, in your heart of hearts, must believe in the mission of your organization, be dedicated to speaking on your organization's behalf, be proactive and tenacious for the cause, and most of all, have faith in the organization, even when circumstances, whether within or outside your control, may be challenging. Your commitment to the group must be clearly demonstrated in every conversation and interaction you have with the person you are going to ask for money. If you believe in your group and the person has an initial inclination or strong desire

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to learn more about that group, then you are halfway there. In time your positive energy will convince the person being asked that, yes, your group is unique, that its charm is different from all the rest, and best of all, that giving, early and often, to this sensational organization is an opportunity not to be missed.

In businesses, the uniqueness comes from the idea, concept, and vision of what you do that no one else thought of and no one else is doing. Even if you want to launch a new play, get a patent on the best invention, or develop software that will make a company highly competitive, you should be able to distinguish yourself from all the rest. The key is to come up with three ways you have something that no one else has, or you can deliver something no one else can, or you do it better, with more personal care and customer satisfaction than the competition. You will hear me reiterate this theme over and over in this book—that for-profit organizations and nonprofits share a commonality to be unique, to provide “customer-” and “donor-” friendly service and attention, which all translates into long-lasting relationships and financial support.

*People Like to Give Money*

As important as it is to know how and when a person was raised, his or her views on money, and why your organization is so important to him or her, it is also important to know why someone would part with hard-earned money. Exhibit 1.3 lists several main reasons that people give.

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**EXHIBIT 1.3.** *Reasons Why People Give.*

1. Belief that giving is the greatest gift of all.
2. Belief that all the money in the world cannot buy happiness.
3. Belief that there will always be someone less fortunate who needs money.
4. Belief that charity begins at home.
5. Belief that it is the right thing to do.
6. Decision that accumulated assets have made it possible to give.

7. Desire to emulate others who give.
  8. Experience of a life-transforming event, such as an accident, near-death experience, or winning the lottery.
  9. Instinct that this will be a wise investment.
  10. Desire to reduce taxes.
  11. Pressure from a friend, peer, or colleague to support a cause that is important to that person.
  12. Need to be recognized.
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In my experience, most people who give when asked in person do so almost instinctively. It is part of who they are and how they live. They want to make their world a better place for generations to come. People also give because they have a strong interest in sharing. Sharing feels good and makes us feel less selfish and self-focused. How people have been raised governs not only their views on money but whether and when they feel a need to help those less fortunate. Many people I have had the pleasure of working with have always given something, beginning early in life with their religious institutions and then focusing on a handful of groups that mirror their beliefs. Others began giving as a result of a persuasive direct-mail campaign. Yet others have witnessed grave injustice, poverty, or illness that has motivated them to take action.

People give because they reach a point in their lives where they have the assets to give back and it will not impede their lifestyle. Their cushion of comfort makes it possible to support a nonprofit group or groups in a significant way. They saved and planned, and it just took the right time to trigger the gift. Sometimes a gift is spurred by an unexpected windfall, such as winning the lottery, getting a case settlement, or making a superior investment. This over-the-top increase in their personal wealth makes it possible for them to give effortlessly. Giving can also be triggered by a sudden, life-transforming experience, either for the person himself or herself or for a loved one. Anyone who has fundraised for a hospital in particular knows the truth of this statement. Many grateful patients give back because a special doctor, nurse, or ambulance team saved their lives or the life of a loved one.

Fundraisers also cannot rule out emulation theory: some people give because they want to be like someone else or, possibly, want to be perceived as having the assets and lifestyle of a prominent person. These folks will give at a certain level so they can be thought to be as prestigious or charitable as a noted and well-respected peer. This elevates their status in the community, particularly when the gift includes a large naming opportunity. This motivation makes people happy to give because it puts them on an even playing field with some prestigious people. May you have many of these people to ask!

Many times when we ask people for money we say the money will be “an investment” so that the organization can have the present and future means to be in existence; or in the business setting, someone believes that with this financial backing a play can be launched, a new patent can be the greatest new invention, or a new company can be formed that has its own unique place in the industry. These are all attractive, appealing, and highly desirable reasons why people want to “invest,” not “part” with, their money.

Although we would all like to think that people support nonprofit causes entirely out of the kindness of their hearts, it would be very naïve to think that other motivations do not come into play. Reducing income and estate, gift, and capital gains taxes are real motivators for some donors. I personally do not think this is a bad thing; in fact, it is a blessing. If some donors could not reduce these taxes, then they would not make charitable gifts at all. It is our job as askers to fulfill their personal and philanthropic goals and desires. Tax breaks for giving to charitable organizations can make it possible for many donors to release precious financial assets to support causes that save children’s lives, improve the quality of life for the elderly, or preserve acres of natural resources.

I have also known donors who have been disappointed with themselves for failing to recognize or act on issues that affected their families. Issues such as smoking, drug and alcohol addiction, and mental illness can traumatize any family. These people have thought long and hard about what they can do beyond helping their immediate family, and they usually support prevention programs aimed at the diseases or other problems that have affected them or a loved one. It is important to know the motivation of the people you are asking for money because that will tell you why they want to give and what the act of giving will mean to them.



The need to be recognized can also drive a person to give. Now, at first glance this may appear to be another “negative” reason for giving. We may feel that people should give because they want to help others and they are able to do so. There are people, however, who are proud of what they have accomplished and have the assets to give. They may want to set an example for others like themselves so that these others will also give. This is not a bad reason to give; it is a celebratory reason to give. These donors can set the tone and pave the way for others to give. Most of them want to take on leadership gift volunteer roles. If you have these folks, clone them, and you’ll never have a fundraising worry again.

All these reasons why people will give to your group are fabulous motivations. Tuck them in the back of your mind as you are preparing to ask for money. I often tell people to memorize this line:

*When you are asking for money, you are not asking someone to give something up, you are giving them the opportunity to invest in your organization and to feel good.*

Think of it as offering the person the greatest opportunity to share—because sharing isn’t giving anything away, it’s spreading it so more people can enjoy it. Think of asking for money as asking for an “investment,” because investments usually last for years, and those investments will make it possible for the nonprofit group or business venture to thrive and prosper for many years to come.

#### *Focus on Positive Results, Not Negative Forces That Perceivably Get in the Way*

This last category of reasons why people hesitate to ask for money is what I call “the runaway train ideas” that often occur when our minds start to drift and focus on all the universal reasons why it would be better to ask at a later time. Let us take these ideas one by one and turn them into positive, mission-focused affirmations.

*“Jack is so hard to reach these days, why don’t we just send our proposal in the mail and I’m sure he will get back to us.”*

People give to people; they do not give to paper. You will have a markedly higher chance of getting money when the Ask is done in person rather than on paper. People cannot see or hear your passion

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for the cause in a piece of paper. But they may sense from you personally that, yes, this is the right thing to do and it should be done now. A written proposal for an individual is fine if used during an Ask for illustration purposes or as a follow-up to the Ask; it cannot substitute for the initial Ask. This is not the time to hide behind paper. It is the time to believe in your cause and to ask in person.

The same can be said about doing the Ask over the telephone, or in an e-mail or text message. These distance media do not allow the personal exchange needed for the Ask. When you use them, the Ask is one step removed from what it should be, an in-person event. They diminish the quality time you need with the person you are asking for money, and they can make your Ask appear unimportant and not a priority.

There are exceptions, certainly, when it may be impossible or highly inconvenient for you to ask in person. For instance, you may be working with a person and then he moves abroad or so far out of your area that you cannot see him in person to do the Ask. In that case it is preferable to call him/her, specifically state that you regret not being able to do this in person, and ask for the investment. The Ask can then be followed up with further telephone calls, correspondence, or e-mails, but telephone, e-mail, and text message Asks should be avoided at all other times. The bottom line is that except in unusual circumstances, always ask individuals in person for money.

*“In these troubled economic times, with unemployment soaring and the stock markets at an all-time low, it would be extremely inconsiderate to ask anyone for money.”*

We will explore asking for money in economically depressed times in depth later in Chapter 3. For now it is important to know that one cannot and should not wait until the economy gets better to meet with people, hear their stories on how they are doing in this type of economic environment, and speak with them in a sensitive and convincing manner about the importance of why you and your organization are worthy of their support now or in the near future. If someone has been supporting your organization, or you have been cultivating them to give at this time, why in heaven's name would you drop this person and lose all this ground you have gained up until now? Indeed, in very tough economic times there is even more reason

to reach out and re-engage with key funders (*Changing Our World*, October 8, 2008). It is also an ideal time to call upon the leadership of the organization to meet with funders and donors one-on-one to stress the fact that your organization needs money to provide critical services now, more than ever (Board Source, November/December 2008).

I often ask the question, “When have we ever fundraised when it was easy?” Even in economically stressed times, our mission, our cause, our constituency, our ideas, our goals and dreams still exist and people do want to know the reasons why it is important for them to start giving or to continue giving in very hard times. Done with sensitivity, Asks should not be postponed during economically challenging times, and this should not be a reason to prevent an Ask if indeed it was the right time for the person to be asked.

*“We are so far behind in reaching our fundraising goal this year, why don’t we just wait until the start of the new year to make these asks?”*

It is a sad but true fact that some organizations are more stringent with reaching fundraising goals than others. It is also equally true that some fundraisers gauge their Asks based on making or not making fundraising goals or reaching a number of Asks each month. I am one of the strongest advocates of asking when the timing is right, as you shall see in Chapter 3, but you must ask when the person is ready to be asked not to fulfill a quota of the number of Asks or to reach a fundraising goal. In my former role overseeing all fundraising activity for two major universities, I always set the goal for front-line fundraisers to see 12 to 15 people in person each month and make three Asks a month. That said, it was more important to me that the fundraising staff showed activity towards these goals, and not that they forced an Ask, or didn’t make any Asks because they fell way behind on their goals.

Fundraising goals are goals that hopefully can be reached. They should not command when an Ask is made nor should they be used as an excuse not to carry out on a consistent and well-thought-out fundraising plan, the identification, cultivation, and asking period for any person.

*“Our annual fund needs to increase to keep up with ever-increasing overhead costs, so maybe we should wait to ask for the larger gift because most assuredly we will lose that person’s annual gift.”*

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I wish I had a quarter for every time a person says that—I would be a very rich lady! Nothing could be further from the truth than thinking that when you ask for a larger gift you are taking away the “unrestricted” annual or direct mail amount. The way to ensure that this never happens is simply to discuss with the person the reasons why it is so important to continue supporting the annual fund and that now they have a wonderful opportunity to continue that generosity by making a gift in addition to their fabulous and thoughtful annual gift. The conversation can go something like this:

“Kurt, you have been such a wonderful and generous supporter over the past  $x$  years and your continued support to the annual fund will make it possible for us to continue serving our children with physically challenging disabilities. We are here today to ask you to continue that support and to discuss with you a wonderful opportunity to invest with us to make an even greater impact with these very deserving children. Let us explain.”

It could not be any simpler or clearer what you are offering. First and foremost, the person’s continued support for the annual fund has to be spelled out. Second, state how a larger gift that will either help more children or will give significant funding for a particular project or program requires a higher level of support. The key is to acknowledge the importance of continuing the annual gift and now that will be coupled with the opportunity to give over and above the yearly gift. In my experience, many people enjoy knowing the benefits and importance of the yearly gift, and if it is explained to them that that support together with the new gift opportunity is so crucial to the existence and growth of the organization, then there should be no worries that the annual fund will ever suffer when making a larger Ask.

### CONCLUSION

Asking for money has two emotional components. First, you must know your views on money and then you must know the views of the person you are asking. There are so many emotional factors surrounding the topic of money that can either make it very easy for you to ask, or can get in the way of your asking for money. Once you go through

the reasons why you may hesitate and resist to ask and re-affirm that you and your cause, or you and your business, are worthy of support, then you are ready to learn the next steps to crafting the best Ask for each and every person. The more you practice these skills for overcoming fear and hesitation about making the Ask, the easier and more fluid your Ask will be. It is a thrilling moment, and, yes, a bit of a rush when the person looks you in the eye and says, "This sounds pretty good, tell me more." Just remember that there is just as much joy, fun, and reward in asking as there is in receiving.

#### LOOKING AHEAD

In the next chapter we will explore all the important factors of having a well-thought-out plan of all the details surrounding the Ask. Too many times, people have some of the details in their head but without a plan, script, or roadmap to the Ask, the purpose of the Ask gets lost, misunderstood, or not delivered with conviction or passion and will result in less or no money. In addition to illustrating the importance of having a detailed budget for large projects and business ventures, the next chapter will lay out a three-step method that will make any Ask a great Ask.

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