

# Ask Checklist



## Values-Based Major Giving Academy

### Getting Ready for the Ask

Here are some of the things to think about when you're preparing to ask a donor to make a personally significant gift.

#### Pre-Ask

- ☐ Ask the donor's consent to ask for a gift

#### Set the Scene

- ☐ Who needs to be there?
  - Just you and the donor (recommended for most cases)
  - Anyone else the donor has said should be there
- ☐ Where will you meet?
- ☐ When will you meet?
- ☐ What will you bring?
  - If the donor has asked: a short proposal, program information

#### Frame the Ask

- ☐ Determine how much you'll ask for based on what you know from the money questions you've asked in cultivation.

#### Take Stock of Your Feelings

- ☐ How are you feeling about this ask? Why?
- ☐ How do you think you'll feel during the ask meeting? Why?
- ☐ How do you think you'll feel after the ask meeting? Why?

#### Practice

- ☐ Say the words over and over!
  - "Will you give \$XXX to support [mission]?"