



# Values-Based Major Giving Academy

Module 6: Making the Ask

# Review

# Action Learning

- Send yourself three love notes
- Reflect on boundaries with Role-Goal-Whole worksheet

Bonus for supervisors:

- Develop team boundaries



# Values-Based Major Giving

- Identify Supporters
- Choose Donors
- Create the Environment
- Build Trust
- Agitate with Love
- Make the Ask**
- Engage with Gratitude





# Module 6: Making the Ask

## Learning Objectives

After this session, you will be able to:

1. Understand the value of a pre-ask and the language for making a pre-ask
2. Ask a donor for a personally significant gift
3. How to handle and what to do after various donor responses



# The Pre-Ask

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Module 6: Lesson 1





## Pre-Ask

A request to a donor to get their consent to be asked for a gift.

# Sample Pre-Ask Language

“I’ve enjoyed getting to know you and the way you think about contributing money and time to our mission and other organizations in the community. I’d like to set a time to talk with you about your gift this year. Is that okay with you?”

“It’s been great to get to know you. I know I’ve had lots of questions and I appreciate your willingness to talk so openly with me about your interest in our mission and why you give. My next question is about your next gift to our organization. Is this the right time to ask you for a gift?”

# Why would you make a pre-ask?

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- Make sure the donor is willing to talk about their gift

*To make the ask with greater ease.*



# Why would you make a pre-ask?

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- Save time and energy

*To make the ask with greater ease.*



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# Why would you make a pre-ask?

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- Increase the likelihood of getting a yes

*To make the ask with greater ease.*



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# Ruth



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# 90 Second Pause

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# Getting Ready for the Ask

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Module 6: Lesson 2





# Planning for the Ask

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- Setting the scene
- Framing the ask
- Taking stock of your feelings
- Practicing



# Setting the Scene

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- Who is involved?

*“Brenda, I’m happy to hear you’re ready to talk about a gift. You mentioned once when we talked that you and your husband make all your giving decisions together. Can we find a time to talk about your gift when he is also available?”*

*“I know you value our CEO’s vision and leadership and you mentioned that your other gifts in the community have been made at the request of organizational leaders. Would you like me to find a time to talk about your gift when our CEO can join us?”*

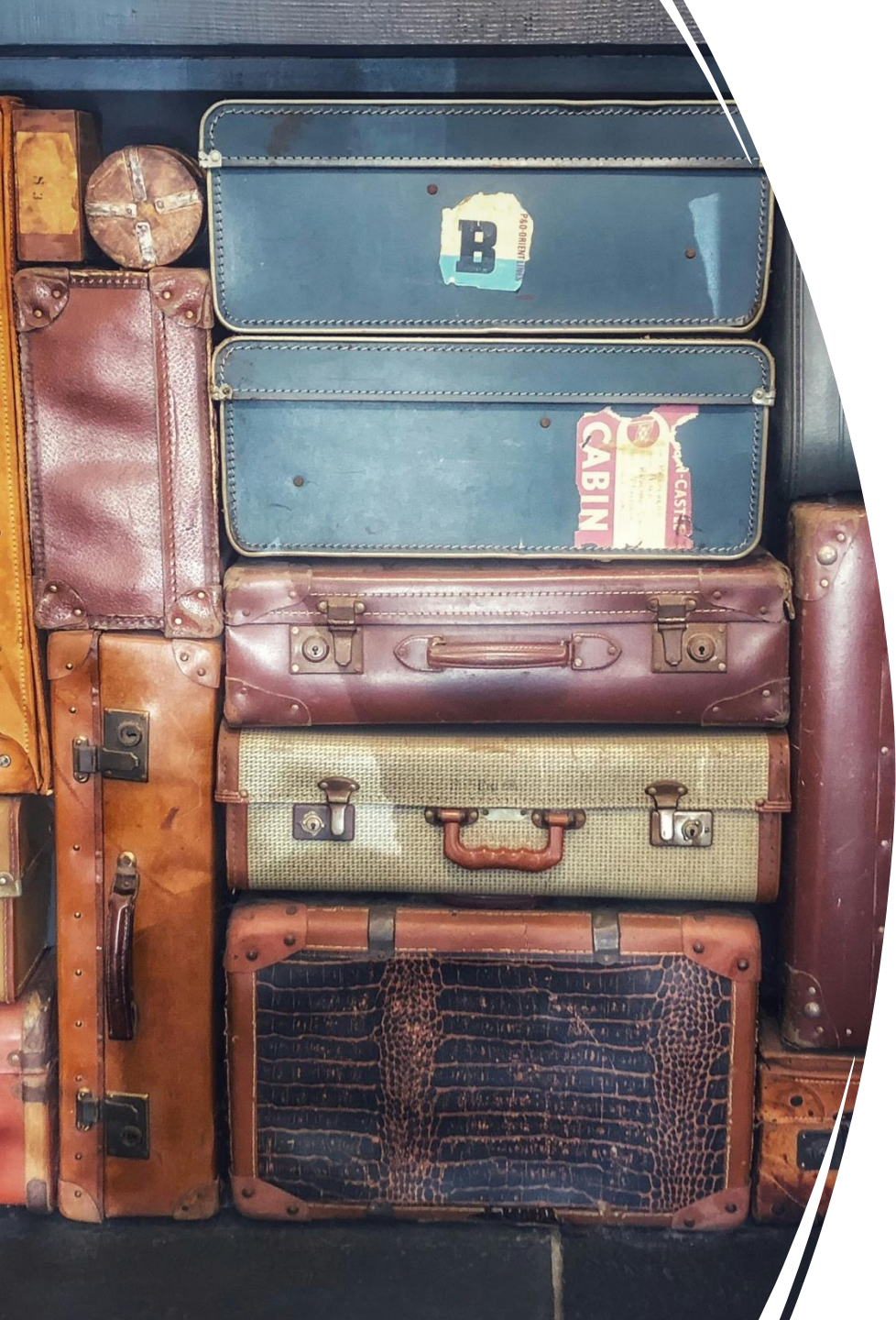


# Setting the Scene

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- Where and when?

*“You know, we’ve been talking a lot over email- is that how I should invite your gift, or would you prefer a meeting or a call? I’m open to your preference.”*



# Setting the Scene

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- What do I bring?
  - *Probably nothing*

# Framing the Ask

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# How much do I ask for? Spencer's Clues

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- Spencer's last gift was \$10,000.
- They'd like to be giving more.
- Your organization is in their top three for giving.
- They've had a good year in their business.
- They've made gifts of \$10,000 to \$25,000 to the other organizations in their top three.
- They really want to see your organization reach more people.

# Framing the Ask

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- Use what you know
- Use your intuition
- Be bold
- Choose a number that will be personally significant for the donor
- Get other opinions
- Make it plausible



# Take Stock of Your Feelings

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# Practice





# The Art of Asking

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Module 6: Lesson 3



# Managing the Conversation

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# Offer a Roadmap

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“Thanks so much for meeting me to talk about making a gift to our organization. I know that’s our main purpose, but I really want to hear how things are going for you, first. Let’s spend a few minutes catching up. How’s your family?”

# Ruth





# Provide a mile marker

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“Time is flying by. I want to be sure we have a chance to talk about your gift. Is it okay if we go there next?”

# Make the Ask

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- Appreciate their support
- Acknowledge their passion
- Ask for their gift



# Appreciate Acknowledge Ask

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Appreciate :

I can really tell that you're in this mission with your whole heart. Thanks for that.



# Appreciate Acknowledge Ask

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## Acknowledge :

I know how much you care about our street outreach team and making sure they are well supported.



# Appreciate Acknowledge Ask

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Ask:

Will you give \$500 to support this work?





## Spencer's Complete Ask:

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“Spencer, you’ve been a long-time supporter of the neighborhood association – and of our community as a whole. I appreciate the financial support you’ve provided over the years and am grateful you show up to volunteer week after week. You’ve told me over and over how important our neighborhood and the people in it are to you. I know you really value community and neighborliness and want our neighborhood to be a place where everyone feels welcome. The neighborhood association is really stretching this year to engage more people and influence city policies that affect all of us. I’m wondering if you’d consider stretching with us by making a gift of \$40,000 this year.”

# Be Quiet.

# Really.

# Donor Responses

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- Yes
- Maybe
- No
- Whoa!





“

Remain curious, invite the donor to share what they're thinking, and listen carefully.

”

# Yes

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- Thank you
- Ask how they're feeling
- Confirm next steps



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# Maybe

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- Lean in: “I’m glad you’re willing to consider this gift.”
- Ask a question: “What do you need to make your decision?”
- Confirm next steps



# No

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- Not a no forever
- Stay curious "Is there a better time?"
- Confirm next steps



# Whoa!

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- Stay in the conversation
- Opportunity to deepen relationship
- Keep the donor talking: “tell me what you’re thinking”
- Confirm next step



SVA



- ✓ Stay curious about feelings
- ✓ Listen to understand
- ✓ Confirm next steps



# 90 Second Pause

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# Action Learning

- Complete the Money Feelings Reflection Guide
- Practice an ask out loud to anyone at least 20x





# Congratulations!

How does it feel to have completed Module 6,  
The Ask?

You're one-step closer to becoming a  
Values-Based Major Giving Specialist.