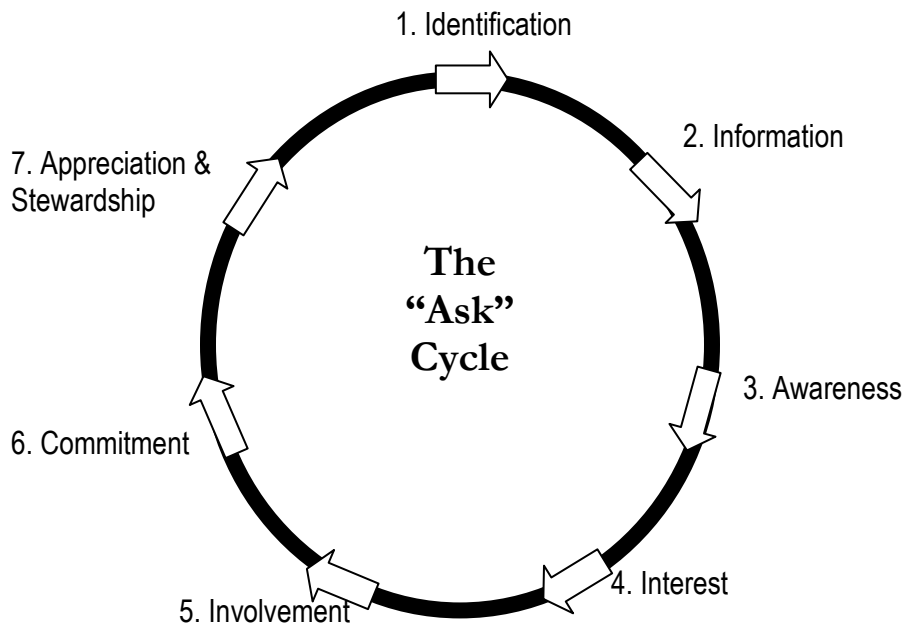


**THE “ASK”**

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**ASKING FOR THE GIFT**

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The right person(s) asking for  
The right gift at  
The right time

## 1. Identification

Choosing the prospects you intend to approach for a gift or commitment.

## 2. Information

Gather information about the potential donor and his/her family and share it with your legacy team.

Share information about your agency with your potential donors. This can be done in a variety of ways including:

- sharing your case statement
- sharing marketing materials
- having a constituent share why they give to your agency

## 3. Awareness

Building awareness of your agency's needs and how a donor's legacy gift will help fulfill your agency's mission. Do not assume that a potential donor fully understands what his or her gift could do for your agency.

## 4. Interest

Cultivate a donor's interest in your agency: invite a potential donor for a tour, an event and other non-fundraising events.

## 5. Involvement

Once a donor has shared his or her passion and interests with you – find ways to involve him or her in your agency through opportunities.

## 6. Commitment

As the commitment of your prospective donors increases, so will their willingness and desire to use their wealth (both now and in the future) for inspired philanthropy that benefits your agency.

## 7. Appreciation

As you get to know your donor, you may get a sense of her/his style and what they may desire in terms of appreciation. However, you should always have a conversation to clarify her/his desires for appreciation.

## 8. Stewardship

A phone call and a personal letter should be sent immediately (within 72 hours, preferably 48 hours). On-going follow-up on how the donor's donation is being used is essential to securing further donations and having that donor act as ambassador for your organization.

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### **SCENARIO #1**

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Joe and Helen Cohen have been donors to your camp for 15 years. Their two children attended your camp and they hope that their grandchildren might be interested in attending when they are a bit older. They are both retired and sold a very successful business. Each year they continue to donate \$500 for camperships without being asked. How would you “ask” them for a legacy gift?

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### **SCENARIO #2**

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Jill Goldberg has been extremely involved with your camp; she was a camper, a camp counselor and also served on your board. As an owner of a construction company; she has been extremely helpful with the facilities. Jill has given to every campaign whether it was for capital, annual or scholarship. You want to approach her now for both the just beginning capital campaign and a legacy gift but times are tough for her business and you are concerned that if you ask for a legacy gift, she might not contribute to your capital campaign or vice versa. How do you “ask” for a legacy gift? How would you ask for both?

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### **SCENARIO #3**

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Bob and Betty Morris have been loyal donors to your camp for over 35 years. While not a substantial gift, each year they faithfully send your camp \$36 with a note. You wonder whether they might be approached for a legacy gift as their only child, a camper in her childhood, has passed away. How would you “ask” the Morris's for a legacy gift for your camp?