

**The Integrated Ask**

An integrated ask is when a donor is given the opportunity to invest in your organization in a variety of ways utilizing the time frames, forms and asset structures that best meets their philanthropic desires.

**Call to schedule an appointment:**

* **Introduce** yourself and your affiliation with the organization.
* Thank them for their support of your organization and **request a meeting** “You are a valuable member of our community and I would like the opportunity to have a conversation with you about (your organization)”
* Set up a **time and place** to meet (wherever and whenever is best for them).
* Let them know if **someone else** will be joining you.

**At your appointment, strive for the following:**

* Body Language and eye contact that communicates **attention.**
* Active listening that communicates **respect and caring.**
* Genuine curiosity that demonstrates **interest.**

**Recommendation is to ask for Annual, Endowment or Capital Campaign Gift first and then move into Legacy conversation.**

**After thanking them for meeting you and a little chit chat:**

* Thank them for their **ongoing annual support**.
* Tell a quick story about the **impact** their gifts have had on those you serve.
* Make it clear that you would not have **achieved** your outcomes without their support.
* Share that because they are part of your success you want to ask them to **extend their partnership** with you.
* Ask them one of the following (or similar) questions to **find out why your organization is important** to them:
  + When you think about Jewish (your community) **40 years from now**, what do you envision?
  + When and why did you make your **first gift to (organization)**?
  + Why have you chosen to be a **loyal donor**?
  + What is the most **meaningful experience** you have had at (organization)?
  + What are your **favorite** things about (organization)?
  + What are your **dreams** for the future of (organization)?

**Focus on the Donor:**

* **Listen** to what they are saying.
* Look for ways to **acknowledge, affirm and agree** with what they are saying…avoid saying “no” or “but.”
* Share the variety of funding opportunities that **meet their interests**.
* Set up the **dual expectation** that they support your organization today and after their lifetime.

**Wait until time is right:**

* + Whatever you hear – **accept** it and use to navigate through the rest of the conversation.
  + **Focus on their connection** to the organization, not what your organization needs.
  + If donor presents you with an unanticipated situation (upset at organization for some reason, financial challenges) don’t get upset, **work with the information provided.**
  + Only ask about an Annual, Endowment, Capital or Legacy commitment when the donor seems **ready** to hear it.

**Once you understand why they value your organization make your case:**

* Share your annual, capital or endowment campaign goals
* Ask the donor to consider an Annual, Capital or Endowment Campaign gift with a specific a dollar amount or a percentage increase
  + “Would you join me in supporting (organization) by making a gift of $X?”
  + “Would you join me in supporting (organization) by increasing last year’s commitment by ($ amount or percentage?)”
* Be Quiet – allow them time to respond – silence is not the enemy here.

**Be prepared to respond:**

* **YES to Annual, Capital or Endowment Campaign Ask** – Great! Thank them and review commitment paperwork with them and then transition to a legacy ask.
  + “Thank you so much for your current operating support (or capital/endowment campaign support) **Have you heard about the Create a Jewish Legacy program?”**
  + If **“no”** take a moment to explain the Legacy program, then proceed.
  + If **“yes”**, ask them to partner with you by **considering making a legacy commitment now** in addition to their generous annual/capital /endowment/campaign support.
  + Briefly **review** how the program works and share the letter of intent. Make sure to advise them of the incentive grant. Explain the opportunity to also choose other organizations.
* **MAYBE** – Give them a chance to explain their hesitation. Ask if there is any additional information you can provide them that would help them with the decision. Set up another time to meet with them, or for a follow-up phone conversation if they need to discuss with spouse or have other issues they want to look into.
* **NEED MORE TIME** - give them a chance to explain their hesitation. Set up another time to meet with them, or for a follow-up phone conversation.
* **NO to Annual, Capital or Endowment Campaign Ask**, ask them why and depending on the reason, transition to legacy conversation
  + “Thank you for your consideration. You have been a committed donor to date and we appreciate your support. I understand you are not prepared to commit to an annual gift now. Perhaps you would consider leaving a legacy since you can do so without having to make a payment now or in the near term.”
  + Review the program with them, make sure to include information about the incentive grant to motivate them to make their commitment now rather than later. Share the letter of intent and the opportunity to choose other organizations.

**No matter the outcome, always thank your donor:**

* Send a **handwritten note** after the meeting to again thank them for having a conversation with you.
* If they agreed to have you follow-up with them, make sure you remind them in the note.

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