



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:

- **Smile** while dialing the number.
- **Introduce** yourself and your affiliation with the organization.
- Thank them for their support of your organization and **request a meeting**. Make it clear that you are working on increasing your Annual/Cash Endowment/Capital support as well as planning for the future.
- 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 annual, endowment or capital campaign gifts have had on those you serve.
- Make it clear that you would not have **achieved** your outcomes without their support.

Ask questions to understand why they value your organization:

- **Focus on their connection** to the organization, not what your organization needs.
- Ask them one of the following (or similar) questions to **find out why your organization is important** to them:
 - 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."
- Whatever you hear – **accept** it and use to navigate through the rest of the conversation.

Wait until time is right:

- If donor presents you with an unanticipated situation (upset at organization for some reason, financial challenges) don't get upset, **listen and work with the information they provide.**
- 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/ Cash Endowment/ Capital campaign goals
- Ask the donor to consider an Annual, Endowment or Capital Campaign gift with a specific 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, Cash Endowment or Capital 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 LIFE & LEGACY™ program?"**
 - If **"NO"**
 - Take a moment to explain what LIFE & LEGACY is, then proceed.
 - Share your case statement.
 - Share why you decided to make a legacy commitment in addition to your annual/endowment/capital campaign support.
 - Invite them to partner with you.
 - Be Quiet – allow them time to respond.
 - If appropriate, advise them of the incentive grant.
 - Share the letter of intent.
 - If **"YES"**
 - Ask them to partner with you by **considering making a legacy commitment now** in addition to their generous annual/endowment/capital campaign support.
 - Share why you decided to make a legacy commitment in addition to your annual/endowment/capital campaign support.
 - Invite them to partner with you.
 - Be Quiet – allow them time to respond.
 - If appropriate, advise them of the incentive grant.
 - Share the letter of intent.
- **NEED TO THINK ABOUT IT to Annual, Cash Endowment or Capital Campaign Ask**– 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 consider.
 - If comfortable doing so, transition to the legacy conversation as outlined above.
 - If not, wait until you get a response to the initial request and then have the legacy conversation.
- **NO to Annual, Capital or Endowment Campaign Ask**, if comfortable doing so, ask them why and depending on the reason,
 - Transition to legacy conversation or end the conversation, thanking them for their time.
 - If transitioning:
 - "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 a cash 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."
 - Follow steps for legacy conversation as outlined above

Be prepared to respond to your request for consideration of a legacy gift:

- **IT'S ALREADY DONE** – Thank and congratulate. Review the Letter of Intent and ask them to sign. Encourage them to consider including other organizations.
- **YES** – Great! Thank them and congratulate. Review the Letter of Intent and ask them to sign. Encourage them to consider including other organizations.
- **I'LL THINK ABOUT IT**– 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. Try not to end the conversation without a time to reconnect.
- **NO** – Ask if they will share their reason. Acknowledge and accept. Depending on the reason ask if it would be ok to follow up with them in six months or next year.

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 you following up, make sure you remind them in the note and follow up at the appropriate time.