



Making the Ask Activity

Your task is to determine the following five strategy elements to prepare for a solicitation:

1. **Request** – A targeted request amount
2. **Sequence** – The sequence of activities leading up to the ask
3. **Rationale** – The reason you are asking the donor to consider a commitment
4. **Strategy** – The strategy to ask for the gift
5. **Ask Sentence** – How you will verbalize the gift request

EXAMPLE: Prospect #1 – Ms. Sharon Dough

Sharon Dough's been giving \$20 per year to the annual fund for the past 20 years. Prospect research revealed some modest wealth indicators.

Challenge: How do we grow this \$20 donor to be a \$1,000 donor?

1. Request: *\$1,000 Special gift to something relating to an interest she might have (if you've uncovered something from research), or to join a leadership giving society*
2. Sequence: *Call for a visit and see if she'll take it. Thank her first in the letters and visit. Might start with a note saying you are going to call, follow up with call (up to three calls). If no response, hand written note about having called with cell number. Try back in three months*
3. Strategy: *Update on great things going on at UL, talk about effort to gain leadership donors, fund some special project relating to her interests, find out why she has given so diligently over the years.*
4. Rationale: *If someone has been giving consecutively for such a long time, they believe in the UL. They have probably never been visited or asked in person for a larger gift. They may also want to consider a planned gift to either perpetuate their annual gift, or at least leave a legacy.*
5. Ask Sentence: *Ms. Dough, we are so grateful for your ongoing support of the Urban League. Would you consider a gift of \$1,000 in 2013, which would qualify you for our President's Circle Membership and help us empower even more youth in our community?*



Prospect #2 – Bigbucks Burger (local fast-food chain)

Bigbucks Burger pledged \$25,000 to create an after-school reading program at the Urban League. The company will be making its final \$5,000 pledge payment this year. Richie Richardson, Vice President of Corporate Responsibility at Bigbucks is a current Board member.

Challenge: He's about to pay off his pledge. Now what?

1. Request:
2. Sequence:
3. Rationale:
4. Strategy:
5. Ask Sentence:

Prospect #3 – Mr. and Mrs. Richard Wannagive

Mr. Wannagive participated in the capital campaign for a new Urban League building back in 1995 (\$50,000 over five years) and has given consistently to the annual fund (\$250 per year). The organization is preparing for another capital campaign.

Challenge: How do we get Mr. Wannagive to increase his annual gift and prepare him for another campaign gift?

1. Request:
2. Sequence:
3. Rationale:
4. Strategy:
5. Ask Sentence:



Prospect #4 – Mr. Bill S. Now

Historically, Mr. Now has not given to the annual fund; however, a capital project in 2000 piqued his interest enough to make a major gift of \$150,000 over three years. He has not made a gift of any kind since his final pledge payment.

Challenge: How do we guide this donor from pledge payment mode to annual fund mode?

1. Request:
2. Sequence:
3. Rationale:
4. Strategy:
5. Ask Sentence:

Prospect #5 – Hamazon (a large online shopping company)

Hamazon, Inc. recently moved its headquarters to your city. They are highly philanthropic and you have heard they are looking for ways to become involved in the community.

Challenge: How do we introduce the Urban League to the company, engage them, and eventually ask for a gift?

1. Request:
2. Sequence:
3. Rationale:
4. Strategy:
5. Ask Sentence: