4 Steps for Fundraisers to Nail Their Next Ask

By Amanda L. Cole

Having a development plan, knowing a donor's giving capacity through wealth screening, and researching until you know everything about a prospective donor are all great fundraising tactics. But what happens after you've identified and qualified a prospect?

At last week's Fundraising Day in New York 2022 from AFP-NYC, the "Making the Ask and Demystifying the Process" panel delved into the art of the ask. Here are a few tactics the panelists suggested to help you succeed in each step along the way — from landing the meeting to responding to the donor's "no."

1. Landing the Donor Meeting

Use your instincts to find the best route to connect to the prospect — whether that's a call, email or LinkedIn introduction.

"Figuring out who in your universe knows the people that you want to try to talk to or could help open doors," Adam M. Doyno, CFRE, executive director of the CUNY School of Public Health Foundation said. "… Getting ready to get the meeting is about figuring out what levers you need to pull to those open doors. And sometimes the doors are obvious and sometimes they might be secret or hidden and you just have to figure out where they are."

Landing the meeting might not be easy, so persistence is key, but don't be dishonest in your outreach. Be upfront about the reason for the meeting, especially if you plan to make the ask.

"Some of the best fundraising advice I ever got about getting a meeting was from a former coworker at United Way, who said to me, 'Listen, these people aren't idiots,'" Doyno said. "'They know that you work for a charity and by definition, you need someone else's money to survive. So, they know when they agree to the meeting that at some point in time there's going to be a conversation about resources. And so, don't mask that in your conversations.'"

2. Practicing for the Donor Meeting

Aside from researching the prospective donor, it might help to have a practice meeting with a colleague to figure out your plan and your objective. For example, Kathryn Van Sickle, director of major gifts at The Chapin School aims to leave a meeting with permission to connect again, as well as an understanding of what further information the prospect needs.

"Whether you are in your first year or past your 10th year, it is never too late or too soon to role-play," she said. "I role-play with my colleagues. I practice what questions I might want to ask."

If you don't have a colleague to practice with, or if your colleague doesn't match the prospects' demographics, you can always turn to a board member, volunteer or your executive director. Leigh Reid, director of development and communications at New Settlement, uses this method since many of her prospective donors don't mirror her background.

"Most of the people I'm talking to are not late-30s, Black women, so I bring people in who may be of a different socio-economic background that match the donor better," she said. "Also, [they are] different ages — just to connect a little bit more on a personal level and to help me frame [answers to] the kinds of questions they may have."

3. Framing the Ask

Doyno, whose department has a $2 million budget of which 20% is individual donors, noted the actual ask is the simplest part of the process. It should be direct, clear and made without hesitation at either the beginning or end of the meeting.

"You need to be very thoughtful in how you are delivering on this," he said. "You need to connect it back to the mission. You need to express the need and you need to share very thoughtfully the dollar amount that you had in mind and the mountains that would move programmatically because, ultimately, this is about the mission."

Van Sickle, who contributes to her nonprofit's $48 million budget, makes use of open-ended questions in order to receive permission to continue closer and closer to the actual ask. She sometimes inquires about other gifts the donor has made to other organizations to set up the framework and eventually transition to asking for that same support for her organization.

"It's bringing them along," she said. "You'll know if you keep getting green lights, you'll be ready to ask."

4. Responding to the Ask

A "yes" allows you to move on to next steps, but a "no" is never a "no." Reid, who oversees $8 million in giving to her organization, views it as a "not right now." Therefore, she asks if there's something about the program that needs to be clarified or offers to give the donor more time if something now isn't the right time in their personal life (possibly a divorce, job change or other personal or financial obstacle).

“Just letting them know I will be in touch and making sure that’s OK,” she said.

However, in some instances, the ask may have been made, with the answer coming before the fundraiser provides the amount. Doyno experienced this recently at lunch with a board member. He had planned to ask for the board member’s annual $25,000 commitment.

“I was prepared to lean into the number and she preempted me,” he said. “She’s like, ‘Oh yeah, I’ve already reached out to my donor-advised fund.’ And so that ends the conversation right in the moment and you just have to have the grace to not ask, ‘Oh OK, and how much did you request?’ But rather to just appreciate it and then ask your finance department once a day, every day if the mail’s come in.”

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