

## **MAKING THE ASK - ARE YOU READY?**

The following are questions to consider before deciding the time is right to make an ask for a donation.

### **1. Is this the right project?**

Have we given the prospect the opportunity to explain their interests to us, and have those interests aligned with this project?

Has the prospect been fully briefed on the project?

Has the prospect expressed interest and enthusiasm for the project?

### **2. Is this the right time to ask?**

Is the prospect well engaged with us?

Is the prospect aware that we need philanthropic funds to support this project?

Should the prospect have any reason to feel surprised or offended by a request for philanthropic support from us at this time?

### **3. Is this the right amount to ask for?**

Do we know how much we intend to ask for?

Is this amount a reasonable ask given the prospect's capacity and our knowledge of their other financial commitments?

If not part of a campaign, is this ask amount enough to fund the project in question?

### **4. Who is the right person to ask?**

Who is the right person (or persons) to make the ask? Best practice suggests two people should make the ask, a peer and an expert in the area to be supported.

Have the persons making the ask undergone training or role-play in asking for major gifts, or rehearsed the ask with an experienced fundraiser?

Does everyone involved in making the ask understand what their roles are, and what the purpose of the ask is?

### **5. What is the right way to ask?**

Does the prospect know prior to the ask meeting that the purpose of the meeting is to ask for a gift?

Is the location of the ask meeting in a private space where the prospect will feel comfortable - perhaps their home or office?

Has the prospect's spouse been included in the meeting?

Is there appropriate supporting material explaining the project and the ask being made?