

# Making the Ask

ASK & YOU SHALL RECEIVE

by Peter L. de Keratry, CFRE

# The Ministry of Development

## Ministry

- ◆ Relationships with those we serve ...parishioners, students, staff
- ◆ one-on-one mentoring
- ◆ leadership training

## Development

- ◆ Heart-felt relationships with benefactors
- ◆ One-on-one with prospective benefactors
- ◆ Inspiring individuals to become philanthropic leaders of our church

# Facts about Fundraising

***“Remember, where your treasure is,  
there your heart is also.”*** Mt 6:21

- Fundraising is a ministry inviting people to become involved in the church in a profound way. When they invest in your mission they give their heart more deeply to the Church.
- People love to give to God's work.
- The giver's need to give is always greater than the organization's need to receive.

# The Major Gift Fundraising Process

**Acquiring  
donors**

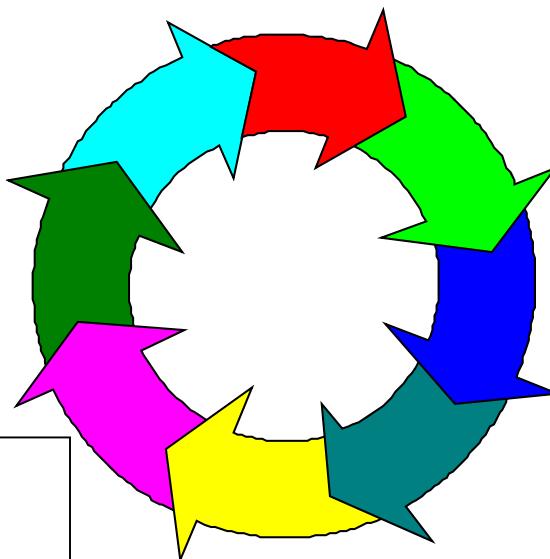


**Identifying the "Critical  
Few"**

**Providing  
stewardship and  
accountability**

**Saying thank you**

**Asking for a  
specific amount**



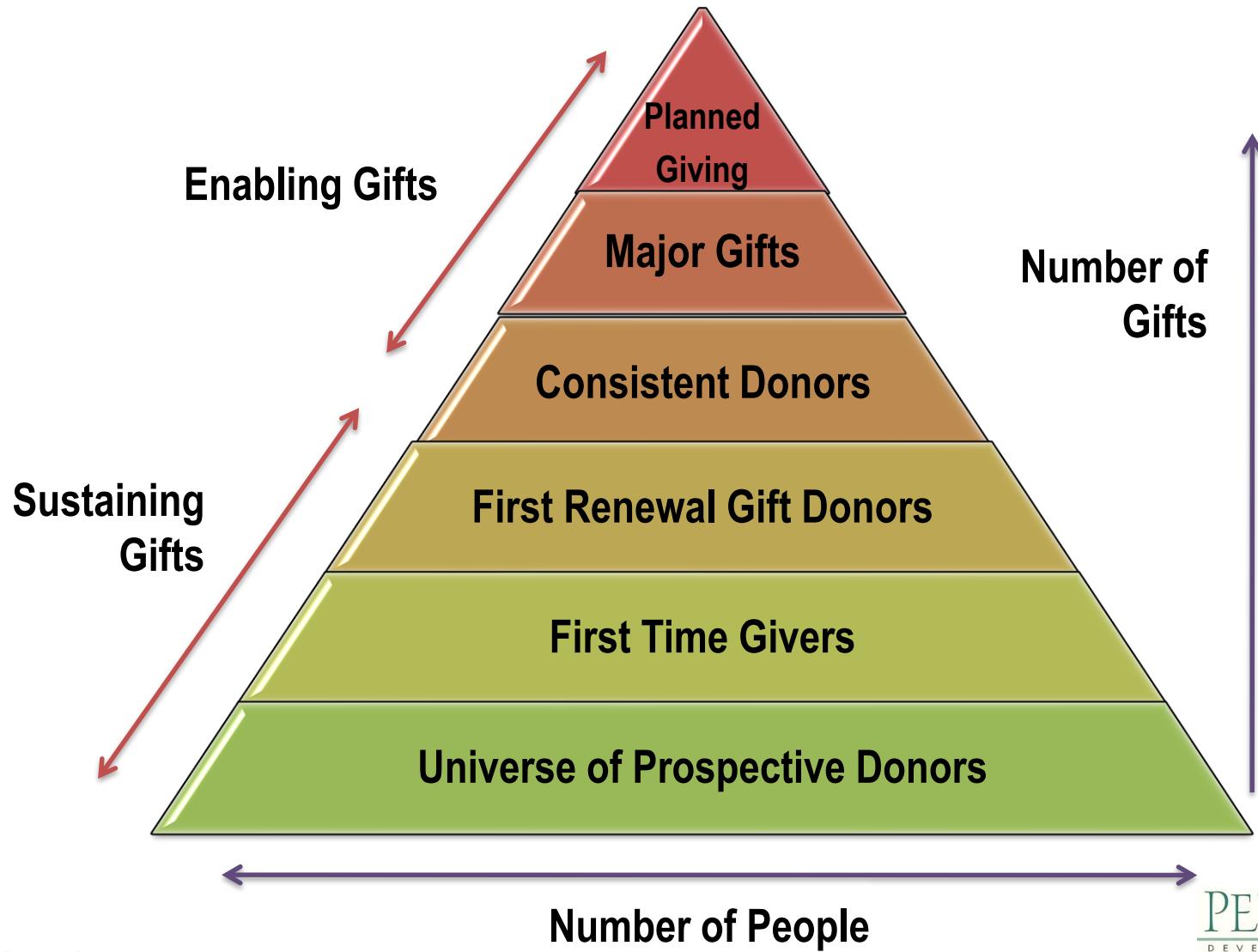
**Preparing to ask**

**Learning about the  
donor; telling your  
story**

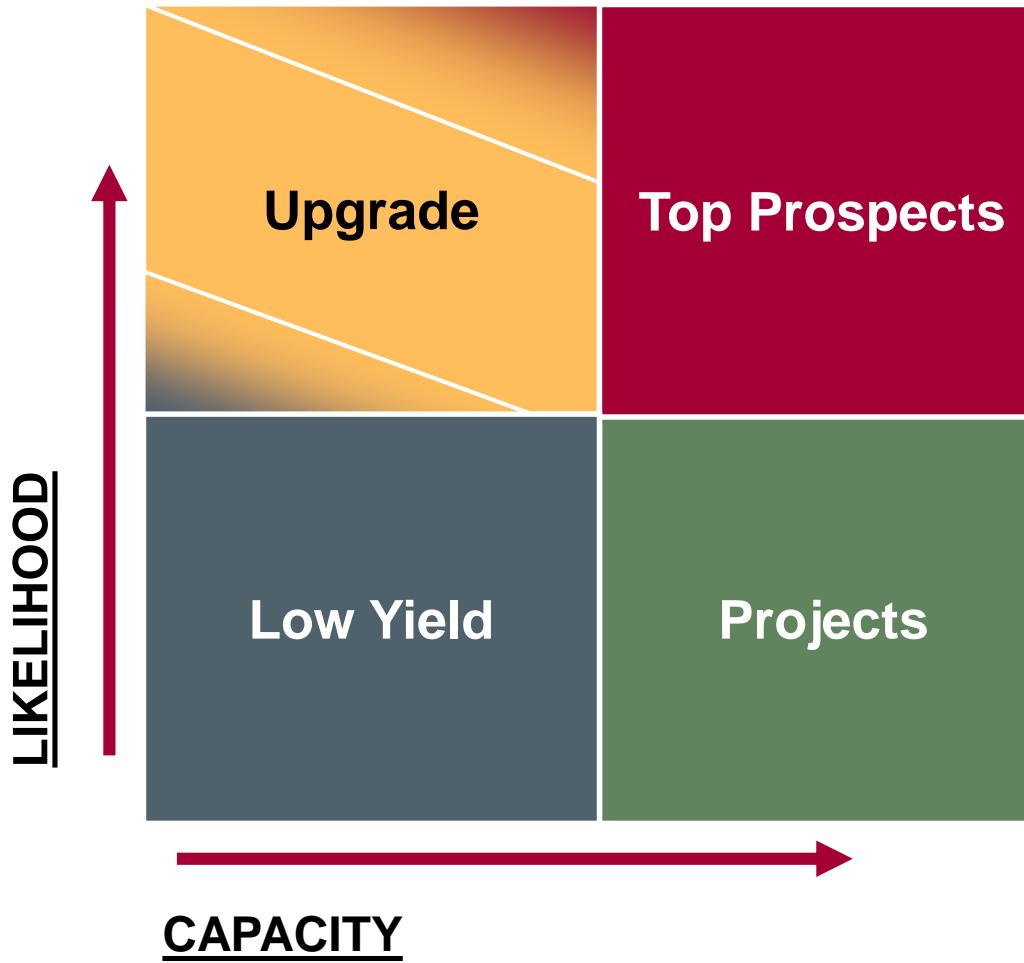
**Developing a  
relationship**

**Engaging and  
Involving**

Source: Karen Osborne  
The Osborne Group



# Likelihood & Capacity



# Ask and You Shall Receive

Step 1: Getting the Appointment

Step 2: Preparation and Research

Step 3: Putting Together a Team

Step 4: Making the Presentation

Step 5: The “Ask”

Step 6: Closing and Follow-Up

# 1. Getting the Appointment

- #1 Best Bet: A friend or peer of the potential benefactor requests & schedules the appointment.
- #2: You have permission to use the name of a friend or peer in order to get the appointment.  
(ie. *“Mrs. Jones suggested that I call you because we’re involved in some work with Catholic ministry at UIC that she thought you would be interested to know about. Would you have a ½ hour to meet with me in the next few weeks?*
- #3: The cold call...

# Getting the Appointment

## #3: The cold call.

- Be firm, assertive and enthusiastic.
- Don't mention \$\$\$ over the phone.
- Do not give a presentation over the phone – just schedule the appointment.

*Eg. "My name is Peter de Keratry and I am the Director of Development for Saint Joseph High School. I am working to try and meet with some alumni to get a feel for the school community. Would you be available next Thursday afternoon to meet with me for ½ hour?"*

# 2. Preparing for the Appointment

Get to know as much as you can about your prospective benefactor before the meeting.

- On-line research
- Ask people who know her/him
- Where s/he went to college? Business, Family, Hobbies, Volunteerism, Philanthropic Support, etc.
- Determine an appropriate amount to ask through your research and by asking people who know her/him.

# 2. Preparing for the Appointment

## Presentation materials

**Professional 1-3 page proposal      Pledge card / letter of intent**

- communicate your mission
- show great photos
- include specific funding request
- discuss how gift will impact ministry

- gift amount
- name, address, phone number, email address
- signature and specifics about payment arrangements

Bring with you a **1-page annual budget summary**  
(in case you're asked #'s)

# 3. Putting Together a Team

1. Director and personal friend/ professional peer of Mr. and Mrs. Philanthropist
2. Director and Development Director
3. Development Director and Board member
4. Any of these alone

Note: Professionalism is essential. It communicates to the donor the importance of this meeting. Dress and speak in a professional manner, confirm the date and time with the donor a few days ahead, and always be there on time.

# 4. The Presentation

## Finding a heart connection:

- Fundraising is similar to church ministry. Try to get prospective benefactors to share their heart with you. Be enthusiastic and sincere when asking personal questions. Find interests you share.
- Talking points:
  - Ask about the photos you see on the desk, family, business...
  - Find out what s/he feels are some of the greatest challenges in the church today...
  - Listen intently to fears/joys/hobbies...
  - Ask: Are you involved with other non-profits?
    - What do you enjoy about your work with that organization?
    - Why do you think this ministry is important?

# The Presentation

## Turn the conversation to your ministry

- Find a way to relate your ministry to the interests or concerns of the potential benefactor.
  - *"Mrs. Jones, it sounds like you have some real concerns about the future of the church. Let me tell you how Catholic campus ministry is making a positive difference to address those same concerns."*

# The Presentation

**Present your mission proudly & passionately.. (in 3-5 minutes)**

- Speak about your overall mission of creating Catholic leaders for the future and specific programming
- Give a personal example of how your ministry changed a life.
- Briefly talk about the impact of retreats, bible studies, summer mission trips and other activities have.
- Relate how your ministry can impact the potential benefactors and what they care about.
- Discuss how your ministry is making the Church stronger for every family.

# 5. Making “The Ask”...

Use short clear sentences.

*“Mrs. Jones, we need your help to reach more students, more effectively. Would you prayerfully consider a personal investment of \$10,000 each year for the next 3 years to support the expansion of Catholic campus ministry?”*

Then, **BE VERY QUIET!**

Once you have made the request you must let the Holy Spirit work in the silence. If you’re nervous your natural reaction may be to talk more. But, no matter how uncomfortable you may feel you must, respectfully, let the potential benefactor speak first.

# Closing and Follow Up

## Potential Reactions and How to Respond:

**Yes!**

- **Respond:** Express your sincere gratitude... your gift will inspire others to get involved and make an impact on your outreach to Catholic students.
- **Close:** Would you like to make your gift today? Go through the letter of intent with him.

# Closing and Follow Up

## Potential Reactions and How to Respond:

***“I’m sorry, I can’t give a gift at this time...”***

- **Respond:** Thank her for her consideration and for the opportunity to share the mission with her.
- **Close:** “I’d really like to keep you informed of our progress. May I come back and update you in a few months to tell you how we’re doing?” In the meantime, would you please keep our ministry and the students we serve in your prayers?

# Closing and Follow Up

- ## Addressing Objections

- If the potential benefactor brings up objections or concerns during your presentation listen intently and respond calmly and positively.
- It's important that he express those concerns, as it indicates a level of interest. It's your job to express how your ministry is tackling those issues.

# Closing and Follow Up

- Before you leave the appointment always ask this question...

***“Is there anyone else we should be talking to about the work we do?”***

If he gives you names of people, ask if he would make a call to get you an appointment?

# Follow up

- Handwritten thank you note within 24 hours.
- Call when you said you would.
- Determine next steps to further cultivate.

# Role Play Exercise

- Break into groups of three
- Determine the following roles
  1. Potential Benefactor
  2. Development professional
  3. Board Member/Staff member
- Take turns “Making the Ask”
  - Focus exercise on the ask
  - \$2,500 per year for three years to the President’s Fund

# The Six Rights

A gift is likely to occur when

1. The right person is asked
2. By the right solicitor
3. For the right amount
4. For the right project
5. In the right way
6. At the right time

Hank Rosso

# Final Thoughts

- Development is a spiritual component of your mission. It begins by communicating the good work you're doing and inspiring others to participate in your work through their stewardship.
- Avoid the Begging Mentality : Fundraising is not begging.
- Jesus never begged people to follow Him – he shared the Good News and gave people the opportunity to be a part of something extraordinary.
- Your job is to share the good news of your ministry and offer people an opportunity to become involved – giving to Catholic campus ministry will bring them joy and often times bring your benefactors closer to God.

**Remember that the only mistake you can make is *not* to ask.**

# Thank You - Questions

