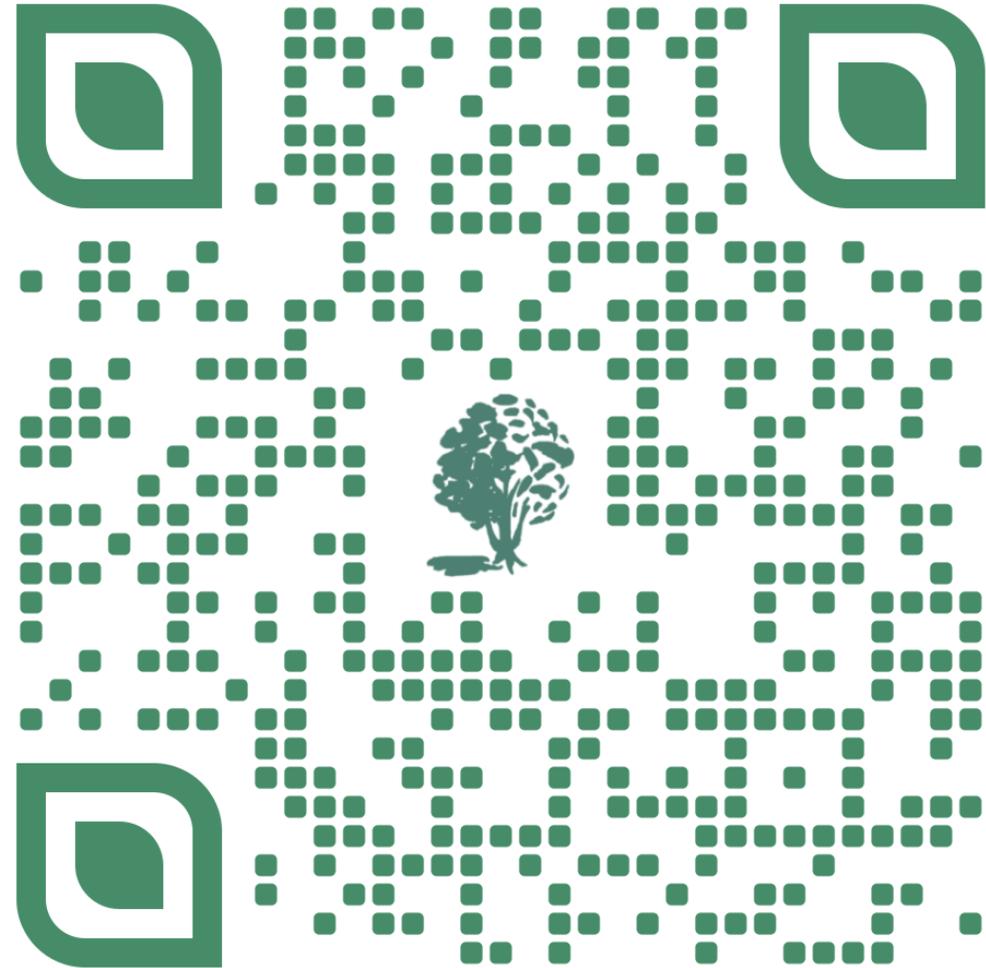


Making the Ask

Agenda &
Presentation
Links





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Laura Lederer
Vice President and
Chief Development Officer
Akron Community Foundation



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Making the Ask

Discover your Fundraising Superpower



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Rules of Engagement

Listening is a superpower – Nikky Perfect <https://www.wbur.org/hereandnow/2026/02/24/hostage-negotiator-listening>

**Others'
Perspective**

**We All Have
a Story**

**Present
Listening**

9 different types of listening skills

Informational listening

Sympathetic listening

Empathetic listening

Discriminative listening

Comprehensive listening

Reflective listening

Selective listening

Critical listening

Appreciative listening



Tips to improve your listening skills:

To become a better listener, it's helpful to master as many types of listening skills as possible. Whether it's a specific type like critical listening or simply learning more about active listening in general, the following tips will help boost your communication abilities at home and in the office.

Focus on non-verbal cues

Pay attention to the speaker's facial expressions and body language.

Avoid interrupting the speaker

Be patient and let the speaker finish delivering their message.

Ask open-ended questions

This demonstrates you are paying attention, engaged, and interested in learning more about them.

Try not to judge

Show empathy for the speaker and keep an open mind without judgments or biases.

Maintain eye contact

Provide eye contact to show the speaker you are an engaged listener.

Be comfortable in silence

Data shows that Western culture is comfortable with 2.5 minutes of silence (max).



What do you have to offer as an organization that is different from other nonprofits?



- Can you get them to **schedule a visit** to your organization to see where the magic happens?
- Make sure that you know their previous history with your organization before the meeting.



WHO are we asking? Preparation is key!

Do we have a relationship with them?

Are they leaders in our organization?

Are they volunteers in our organization?

Have they been giving to our organization?

Are they leaders in the community?



Overcoming the Obstacles that Inhibit Giving

Obstacle #1

Scarcity – we prejudge what we think others are capable of giving. This clouds our thinking and hinders us from asking the right questions.

Obstacle #2

Despair – The challenges we face in our world are big. We cannot allow this to drive us to despair or inaction. No one is responsible for resolving any of our greatest problems alone. Rather, each of us carries the burden of making things better in our own chosen atmosphere.

Obstacle #3

Fear of the unknown – Reaching out to make real human connections can be intimidating at first. A common reaction is to flee from spontaneity and authenticity into a world of regiment, planning and control. Bring your true self and the stories that encapsulate it to the table.

Obstacle #4

Fear of rejection – If your goal is to guide people to look inside themselves and discover what they truly care about, as part of a more meaningful existence, then there is no possibility of rejection.

WHY are we asking?

- **Russell James, J.D., Ph. D., CFP®** is a chaired professor at Texas Tech University where he directs the on-campus and online graduate program in Charitable Financial Planning (planned giving)
<https://www.encouragegenerosity.com/>
- **Socratic fundraising** focuses on asking thoughtful questions to guide donors in discovering their motivations and defining their philanthropic goals.
- **Identity:** Connect the donor's history, people, and values to the cause. "You have been a loyal supporter of our organization." Explore the donor's connection to the fund and how it connects to the cause, their values, and their life stories by asking questions.



People seeking to help others and make an impact



Fundraising is about relationship building



Creating human connection



Convince others that your organization is trustworthy and competent. Be confident in the statistics of your nonprofit: administrative fees, population served, and numbers to back up your case for support.



Help them accomplish something that is important to them



The right questions will help move the conversation in the direction you want it to go. The prospective donor has the keys to the car you want to drive.



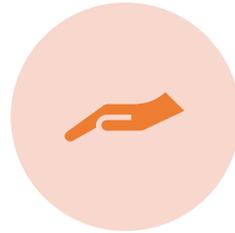
WHAT do I say and how do I say it?

- The ask!
- Ways to give
 - Cash
 - Gifts from donor advised funds (DAFs)
 - Appreciated stock or mutual funds
 - IRA and retirement plan assets
 - RMD – what is it and how does it work?
 - Planned gifts – bequests, memorial and tribute gifts, life insurance, CGAs and more



The Art of the Ask

- Respect the confidentiality of the process. Donors don't need to complete a form during the visit.
- Ask in private and not via a phone call
- Be respectful of their time



THERE IS NO ONE
"RIGHT WAY" TO
ASK. EVERYONE
HAS A UNIQUE
STYLE



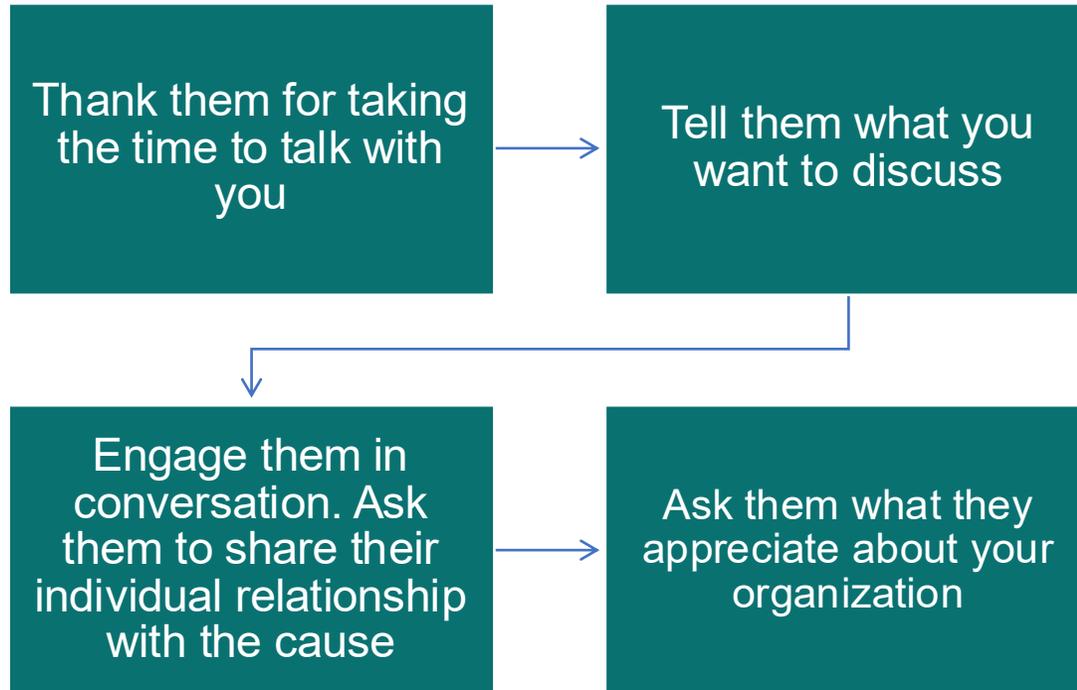
SCHEDULE
ONE-ON-ONE
CONVERSATIONS



BE PREPARED. THE
OBJECTIVE IS TO
GET THEM TO TALK
ABOUT WHAT OUR
ORGANIZATION
MEANS OR HAS
MEANT TO THEM



The Meeting



- Summarize their response
- Adapt your presentation to what they share
- Key takeaways:
 - **Inform**
 - **Reflect**
 - **Deflect**



Key Takeaways

1

If you are a volunteer for the organization, your elevator speech is simple – just answer the following questions for yourself. It will help you understand the Why questions:

- **Why do I give?**
- **Why is this important?**

2

Fundraising is relationship-driven. People give to people, not causes.

3

If you get asked a question you can't answer, that's ok. Let them know you'll find out and get back to them. And it helps you schedule the second visit.



The Donor and the Universal Hero Story

www.encouragegenerosity.com/TheEpicFundraiser.pdf

- Russell James describes the Hero's Journey.
- As fundraisers, we don't have material values to present to donors. But we can make donors the **Heroes** of their own story. Through philanthropy, donors can support meaningful values that transcend their own lives. They can impact others beyond themselves. They can leave a legacy that will last beyond their own lives. In short, philanthropy allows donors to be heroic.



Practical Applications

Ask questions! Here are some examples:

Tell me a little bit about yourself. Were you born in Akron? Tell me about your family. Tell me about your job. How can ABC organization help you? Help you accomplish your charitable goals?

This puts everyone at ease and allows you to tailor your request.

Use words that demonstrate empathy and relatability.

F.F.F. Exercise

Feel – you acknowledge what they are saying

Felt – convey that you relate to what they are saying

Found – sharing positive outcomes and solutions



Now What?

If yes....

- Thank you
- IF possible, try to get a second meeting. Never press for an immediate decision during the first meeting.
- Ask if you may follow up with them and schedule the time
- Make notes for yourself of the meeting debrief
- Hand-written thank you notes never go out of style.

If no...

- Thank them for their time
- Are you hearing “not right now?”
- How do we keep them engaged?
- Your response right now may determine what happens next. Say something like, “I understand. Is there anything else I can do for you right now?”

Follow up



- Thank you note – whether it is a yes or a no
- Every meeting is cultivation and training. Face-to-face meetings are always valuable

Questions?



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