



# The “Triple” Ask Trifecta of Fundraising



# Today's speakers



**Sara Jolly**  
AVP Development  
Nicklaus Children's Hospital Foundation



**Bill Mountcastle**  
President  
Health Giving



# Today's agenda

1. Define the Triple Ask
2. Review Fundamentals of the Triple Ask
3. Look at Case Studies of Triple-Gift Donors
4. Share Tips & Advice and Cues & Clues
5. Conclude

## Fidget Spinners are:

- Very popular toy
- Marketed as an antidote for ADHA and anxiety
- Typically, 3-sided
- Said to help people remember details





# The Triple Ask

Three-Sided Fidget Spinner of Fundraising





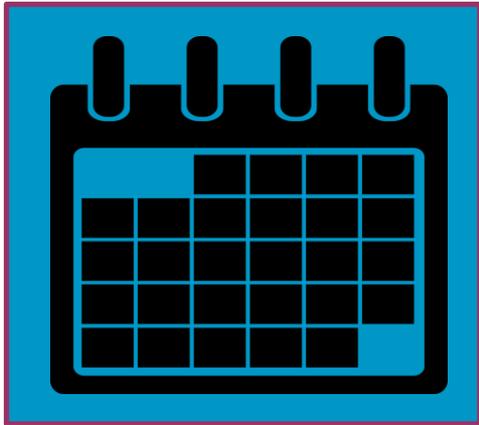
# What Details Should We Remember Today?

## Definition:

Triple Ask is the process, act, or instance of simultaneously soliciting one potential philanthropist for three gifts:

1. Annual investment
2. Capital investment
3. Deferred investment (aka planned gift)

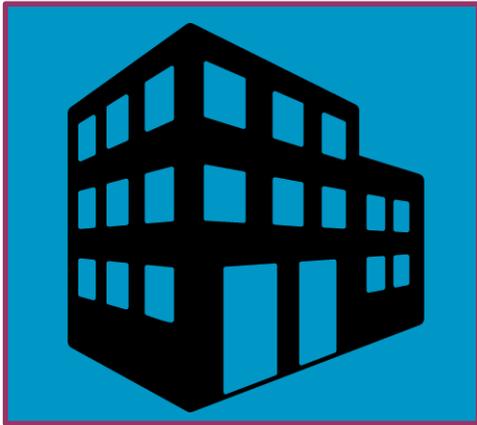
# Annual Investments



Annual investment, a.k.a. an annual gift, is a TODAY gift.

- Are generally smaller but often receive more.
- Normally pays for day-to-day operations.
- Nearly always fund current status.

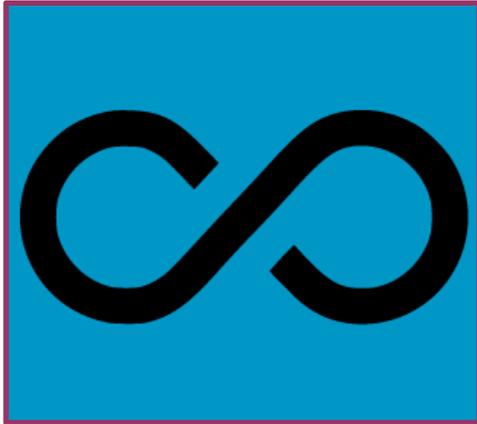
# Capital Investments



Capital investments, a.k.a. major or campaign gifts.

- Are large donations.
- Fund leadership visions the plans for **TOMORROW.**
- Require planning and thoughtful interactions.
- Often used to fund specific projects or campaigns.

# Deferred Investments

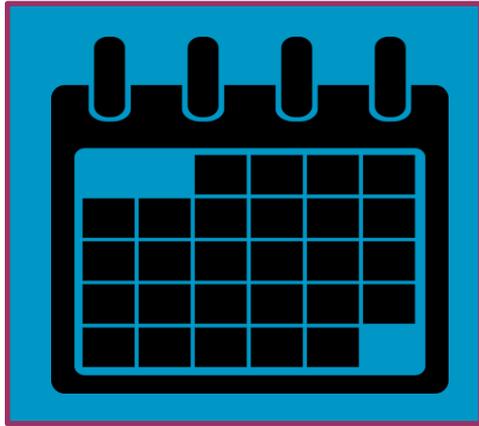


Deferred Investment, a.k.a. planned gift or LEGACY gift.

- Arranged in the present and allocated at a future date.
- Commonly donated through a will or trust.
- Often granted once the donor has passed away.
- Means that somebody has planned their LEGACY.

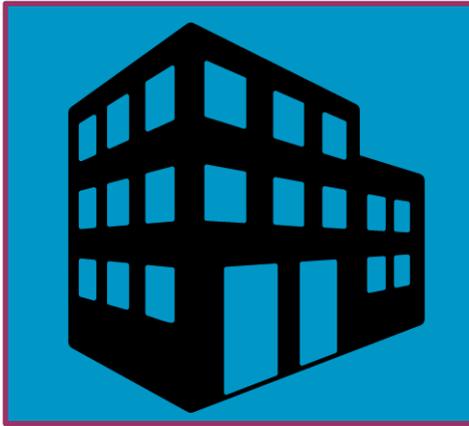
# Three Important Things To Remember

**TODAY**



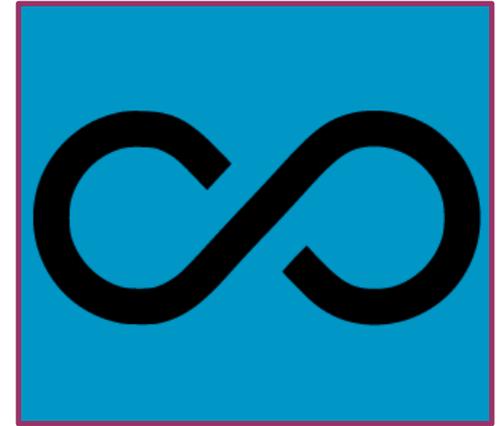
**Annual Investment**

**TOMORROW**



**Campaign Investment**

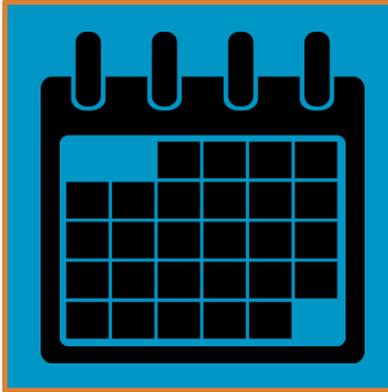
**LEGACY**



**Deferred Investment**

# Triple Ask - Logic

**TODAY**



**Annual Investment**

**Support Operations**

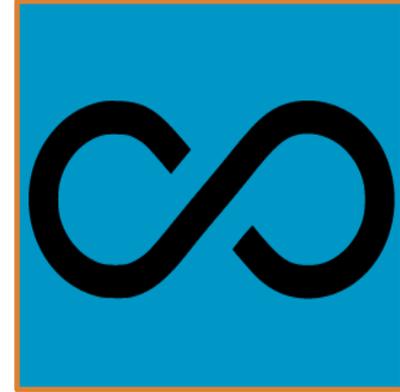
**TOMORROW**



**Campaign Investment**

**Advance Growth**

**LEGACY**

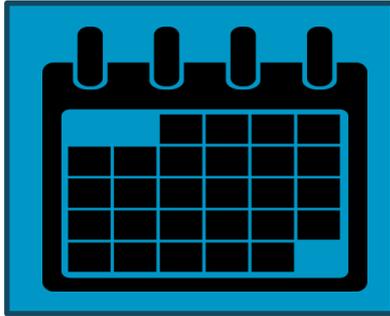


**Deferred Investment**

**Create Legacy**

# Triple Ask – Giving Situations

## TODAY

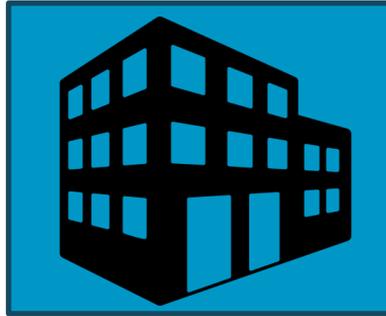


### Annual Investment

#### Support Operations

Cash for your Current  
Impact / Current Programs

## TOMORROW

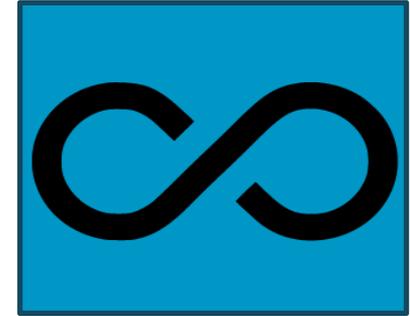


### Campaign Investment

#### Advance Growth

Multi-year funding  
opportunities tied to your  
biggest priorities or programs

## LEGACY



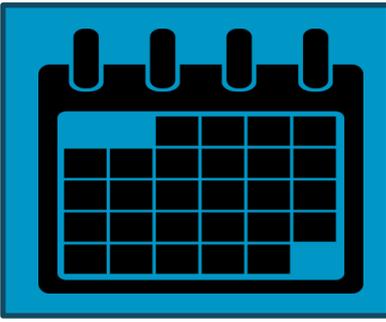
### Deferred Investment

#### Create Legacy

Legacy or planned giving  
and Transformational Giving  
opportunities

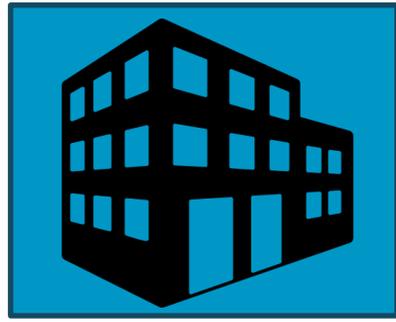
# Triple Ask – Donor Expectations

## TODAY



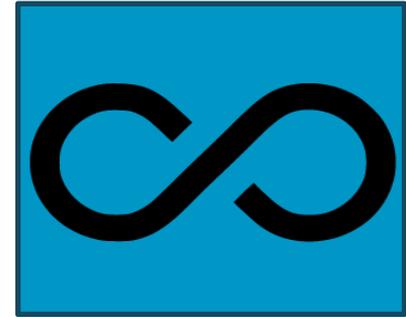
- Expect you to ask every year
- Give with that expectation in mind

## TOMORROW



- Recognize it as something that's over/above the operating budget
- Appreciate 1-time, special investment to move you to the next level

## LEGACY



- Plan to perpetuate their philanthropic support of your org. past lifetime
- Want to leave a legacy and be honored / remembered for support

# Triple Ask - Time and Energy

Cultivation vs. Solicitation

Annual Investment – Today Gifts – Supporting Operations



**Cultivate**

**Harvest**

Capital Investment – Tomorrow Gifts – Advancing Growth



**Cultivate**

**Harvest**

Deferred Investment – Legacy Gifts – Creating Legacy



**Cultivate**

**Harvest**



# Professional Opinion Shared



Ms. Anita Biggift, CFRE  
Sr. VP of Philanthropy  
Multi-hospital Health System

*“This should be a comfortable conversation with your best donors. An astute philanthropist will grasp the logic of this argument and will think of it as a package rather than three asks. Triple asking then is just putting multiple items together to offer a helpful situation during a solicitation presentation.”*



Triple Ask:

# 7-Fundamentals



1.



2.



3.



4.



5.



6.



7.



## Triple Ask: Recognition Importance

- **Work out recognition before asking!**
- **Allow getting more recognition**
- **Make few exceptions.**
- **Help them get what they want, within reason**



# Case Study #1

Can We Also Count On Your Annual  
Year-End Gift?



# Case Study #2

Pediatric Cancer Center  
Secures Triple-Gift

# Triple Ask: Best Candidates

- Volunteer Leaders
- Major Donors
- Long-Term Donors who are connected to your mission (Grateful Patients / Families)
- Older (60 and up)
- Single (never married, divorced, or widowed)
- Without children or grown successful children
- History of employment or volunteerism with your org.



**TODAY**  
(Annual Gift)



**TOMORROW**  
(Capital Gift)



**LEGACY**  
(Planned Gift)

# Professional Opinion Shared

*“Donors respect that you will not pepper them with piecemeal requests. I suggest you make your asks in the following order: campaign ask, annual ask, then legacy ask. This can be done in one meeting, with extensions, as necessary. Make your approach truly comprehensive. And, if your organization is not engaged in a specific campaign, use the double-ask.”*

**Not in a Campaign – Make Double-Ask.**

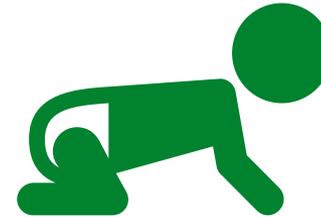


Ms. Shirley Askin  
Regional Health System  
Director of Philanthropy

# Triple Ask - Tips and Advice

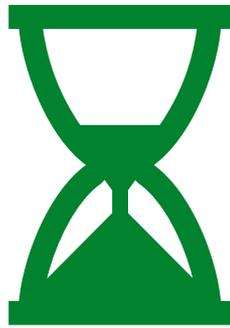


**LISTEN CAREFULLY FOR  
CLUES AND CUES**



**TAKE BABY STEPS**

# Triple Ask - Tips and Advice



**BE SENSITIVE TO THEIR TIMING**

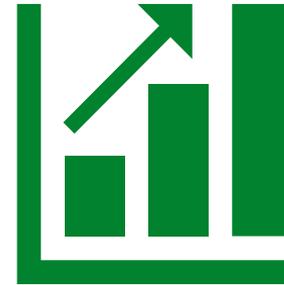


**EXPLAIN WITH A STORY**

# Triple Ask - Tips and Advice



**INCLUDING FAMILY MEMBERS**



**SHARE RESULTS AND IMPACT**

# Triple Ask - Tips and Advice



**BE DONOR-CENTERED**

# Professional Opinion Shared



Mr. Chase N. Wealth  
Children's Hospital  
Chief Philanthropy Officer

*"You have to be a good listener to be effective at making the legacy part of the triple ask. After discussing our Children's Hospital's long-term and capacity-building needs with a potential donor, I listen closely and intently and try to understand how the donor sees herself and her philanthropy. If it's right, I ask, "Would you consider making your legacy gift to help us build this future?" While the words may vary, using the qualifier "consider" makes this a somewhat less direct ask than one for a capital or annual fund gift."*



# Listen to Cues and Clues

When you hear a potential donor utter the following phrases during your visit, an opportunity has presented itself for you to visit with them about Triple-Ask.....

**“I wish I could do more....”**

**“I’m getting ready to sell farm/ranch/business/real estate/securities....”**

**“I’m tired of low-interest returns and ups and downs of the market, I need more income ....”**



# Listen to Cues and Clues

***“Yes, we’ll make a campaign pledge now, and just know we are revisiting our will....”***

***“We want to plan for our future charitable wishes....”***

***“We are proud of our annual support and love attending your Holiday Gala yearly. Pretty soon, we should talk about how our philanthropy planning can take care of our family, right?....”***

***“I don’t have a will....”***



## Professional Opinion Shared



Mr. Hugo Naemgift  
Chief Development Officer  
Regional Cancer Center

*“Triple asking is following the relationship-based fundraising model. Don’t pit the Annual Fund against Campaign Gifts or Planned Gifts. Those are internal silos. Our donors don’t want us running an ‘annual campaign’ and returning later to push a ‘capital campaign.’ No, they appreciate us and want us to sit down with them and say, “Here are all the ways you can support us right now!”*”



# How Others Have Said It

Samples: letters, emails, call scripts, solicitations



# Concluding Thoughts

Building life-long relationships

Practicing makes Triple-Asks easier, rehearse and run-through.

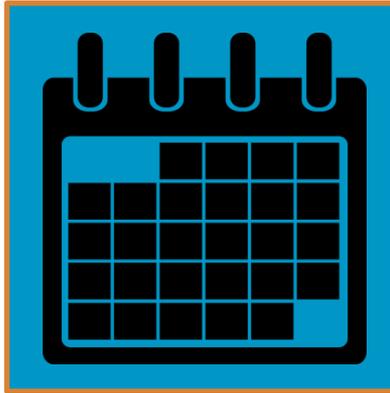
Being donor-centered, proactive, and honest.

Understanding people who complete legacy gifts support ongoing needs and visionary campaign projects too.



# Triple Ask

**TODAY**



**Annual Investment**

**Support Operations**

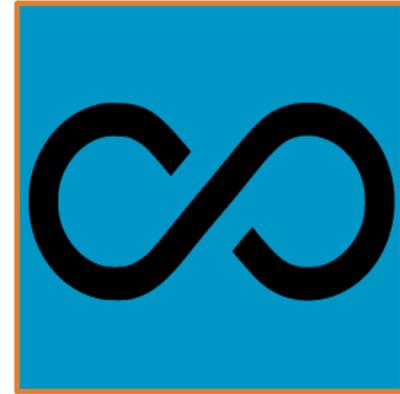
**TOMORROW**



**Campaign Investment**

**Advance Growth**

**LEGACY**



**Deferred Investment**

**Create Legacy**



Defined Triple Ask

Reviewed Fundamentals of Triple Ask

Looked into Case Studies of Triple-Gift Donors

Discussed Tips, Advice, Cues & Clues

Explored What Others Said to Make Ask

Reviewed Questions

Recap

What We  
Discussed

