May I? The Power of Permission in Fundraising

Nathan Battle, CFRE · Founder, Battle Advancement Solutions

A Conversation That Said It All

Not long ago, I was catching up with a former Board member — someone who has been one of our school's most generous donors over the years. I was telling him about a new campus project we were working on, and I could hear myself getting more animated as I described it. The vision, the impact, the excitement of what it could mean for students.

He stopped me mid-sentence.

“What’s that going to cost?”

I told him.

He shook his head slowly and said, “I don’t know how you do it. This wouldn’t make me excited — it would make me terrified. I don’t know how you ask people for money. It seems like it would be so awkward.”

I paused for a moment, because this struck me as worth sitting with. This is a man I have asked for multiple six-figure gifts. So I said, “Well — I’ve asked you for money many times over the years. Was it awkward?”

He chuckled. “No,” he said. “It was kind of… normal.”

“Why do you think that is?”

He had no idea.

So I told him: “Have I ever put a proposal in front of you, or asked you for anything, without asking your permission first?”

He thought about it. “No,” he said. “You haven’t.”

“And that’s why it’s not awkward. Once permission is granted, the door’s been opened. We can speak freely.”

That exchange captures, better than any framework I know, the essential truth about fundraising: the ask is not the hard part. The preparation is. And the most important part of the preparation is not the proposal, or the research, or the case for support. It is the simple, often overlooked act of asking permission.

The Problem with the Ambush

Not every fundraiser operates this way. Jim Langley has written compellingly about what he calls the “ambush ask” — luring donors into meetings under false or veiled pretenses, then making a pitch they were never prepared for. The damage this approach does is not just relational. It is institutional. It poisons the well for every honest practitioner who comes after.

And yet the instinct persists. Why? Because asking permission feels slower. It requires patience. It asks us to trust that a well-prepared donor will ultimately say yes — and that trust can feel uncertain when the clock is ticking and the campaign goal looms.

But the instinct is wrong. The ambush is not faster. It simply moves the failure earlier in the process and calls it efficiency.

What Permission Actually Does

When you ask a donor’s permission before each meaningful step — before sending a concept paper, before requesting a meeting, before making a formal ask — you are doing several things at once.

You are signaling respect. You are acknowledging that their time and attention have value. You are demonstrating that you see them as a partner in the work, not a target in a campaign.

And you are doing something strategically essential: you are creating informed donors.

An informed donor who has read your case for support, reflected on it, and chosen to engage with it is a fundamentally different conversation partner than someone who is hearing your pitch cold. They arrive with questions, not defenses. They are already thinking about possibility, not escape.

Langley captures this well. Asking permission and previewing material in advance leads donors to feel fairly treated, to develop a higher opinion of the institution, and to be genuinely predisposed to respond favorably. This is not a soft, feel-good principle. It is a strategy that produces better outcomes.

My former Board member did not experience our conversations as awkward because he was never surprised. He always knew why we were meeting, what we were exploring, and what, if anything, I might eventually ask of him. By the time a proposal arrived, it did not feel like a request — it felt like a natural next step in a conversation we had already been having.

"Once permission is granted, the door's been opened. We can speak freely."

Permission in Practice

What does this look like at each level of the fundraising pyramid?

For annual donors, it might look like reaching out before the appeal season to share next year's priorities and ask which resonate most. Not a solicitation — a conversation. You are inviting them to tell you what matters to them, which both honors their perspective and helps you craft a more compelling appeal when the time comes.

For mid-level donors, it might mean sending a brief impact summary and asking permission to follow up in person or by phone to hear their reaction. The ask is not for money yet. It is for a dialogue. And that dialogue, conducted well, becomes the foundation for a future gift.

For major gift prospects, it might mean sharing a draft concept paper and explicitly asking them to suggest improvements. This is one of the most underused moves in major gift work. When a donor helps shape a proposal — even in small ways — they develop ownership over the idea. Their investment becomes intellectual and emotional before it ever becomes financial.

For planned giving conversations, permission takes on an even more personal dimension. Here we are not simply discussing a project or a campaign. We are asking donors to reflect on their values, their legacy, and what they want their wealth to mean beyond their lifetimes. Moving into that conversation without invitation is not just ineffective — it is presumptuous. The permission-based approach, perhaps starting with a shared resource or a reflective question,

creates the kind of trust that makes those conversations not just possible, but meaningful.

What I Have Seen in Schools

In my work with independent schools, I have found that the permission gap most often shows up not in major gift visits but in the daily habits of advancement offices. Annual fund letters that assume rather than invite. Emails that ask without first earning the right to ask. Cultivation events designed to prime a solicitation that the donor never knew was coming.

These practices are rarely malicious. They emerge from pressure — pressure to hit goals, fill classes, close gifts. But they accumulate into a culture of transaction, and transaction is the enemy of philanthropy.

The schools that build the strongest advancement programs are the ones that build the most trusting relationships. And trust, in my experience, is almost always traceable to a simple practice: asking before assuming.

A Different Kind of Momentum

When I reflect on the most successful fundraising I have been part of — including the remarkable community investment at Forsyth Country Day School during a period of leadership transition — what strikes me most is not the size of the gifts or the speed of the campaigns. It is the quality of the relationships that made them possible.

Those donors gave not because they were cornered or dazzled or worn down. They gave because they were invited. Because they understood the vision. Because someone took the time to ask: May I share this with you?

That question is the beginning of everything.

It is how trust is built — one conversation at a time, one permission at a time — until a donor does not just believe in your school, but feels genuinely seen by it.

And when that happens, the ask is never awkward. It is simply the next step in a conversation that has already, quietly, become a partnership.