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W E B I N A R



# The Collaborative Ask: A Paradigm-Shifting Approach to Mega Gifts



**Gail Perry, MBA CFRE**

President  
Gail Perry Group

WEDNESDAY, MAY 7, 2025

# Let's Get Started!

What's one word you would use to describe how you want donors to *feel* after interacting with your organization?



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# Meet Gail Perry

Gail Perry is a nationally recognized philanthropy expert, speaker, author, consultant, and coach with over 30 years of experience in major gift fundraising.

Named a LinkedIn Top Voice in Philanthropy and one of America's Top 10 Fundraising Experts, Gail has successfully coached more than 60 capital campaigns, helping organizations secure transformational gifts and build lasting donor relationships.

Through her work, she empowers nonprofits to achieve fundraising success with energy, strategy, and heart.



**Gail Perry**

President  
Gail Perry Group

# The Collaborative Ask:

## A Paradigm-Shifting Approach to Mega Gifts

By Gail Perry MBA CFRE



## **Gail Perry, MBA CFRE**

President, Gail Perry Group *@gailperrync*

- Philanthropy expert, speaker, author, consultant, coach
- 30+ years experience in major gift fundraising
- LinkedIn Top Voice in Philanthropy
- Coached 60+ capital campaigns
- Top 10 America's Fundraising Experts

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# Gail Perry Group

**Empowering nonprofits  
to achieve extraordinary  
fundraising results.**

- Successful **capital campaigns** for organizations of all sizes.
- Fundraising workshops and retreats for board members and CEOs.
- Universities and independent schools, medical, social services, arts and culture, environmental, animal, science and research.
- Major Gifts Intensive: Live coaching and training, Feb-June 2025.



# The Collaborative Ask – A Paradigm-Shifting Approach to Mega Gifts

- Seven Shifts You Have to Make
- Steps in a Collaborative Gift Conversation
  - The Donor Story
  - What resonates with them most?
  - Want to get more involved?
  - Ask for advice
  - Would you like to know how you can help?
  - Is this a good time to discuss your support?

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# Fundraising in Today's Environment

## Giving During Recessions

Total U.S. charitable giving in billions of dollars, 1983-2023



Figures are adjusted for inflation.

Source: Giving USA • [Get the data](#) • Created with [Datawrapper](#)

# Fundraising in Today's Environment

## Year-over-Year Percentage Changes (2001-2024)

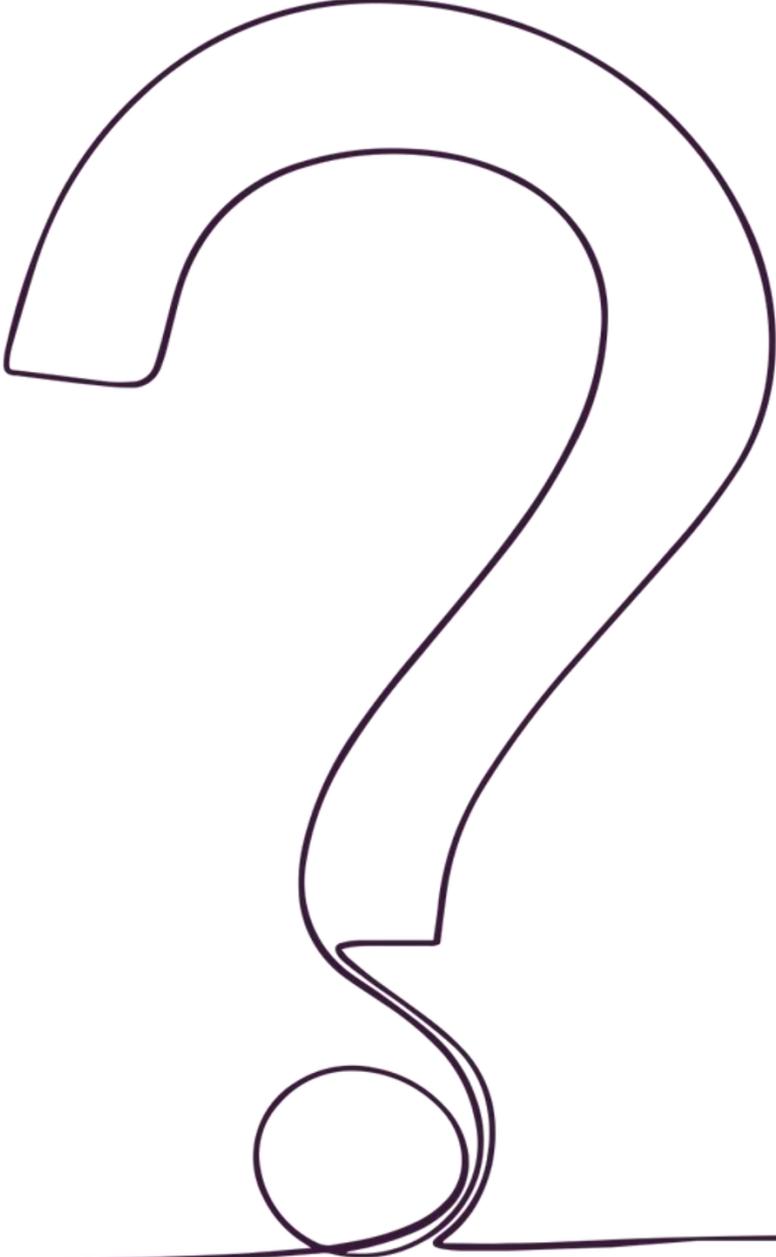
YEAR	S&P 500 YOY CHANGE (%)	US PHILANTHROPY YOY CHANGE (%)
2001	-13.04%	+7.47%
2002	-23.37%	+7.06%
2003	+26.38%	+2.92%
2004	+8.99%	+8.65%
2005	+3.00%	+8.13%
2006	+13.62%	+4.86%
2007	+3.53%	+3.99%
2008	-38.49%	+2.08%
2009	+23.45%	-3.60%
2010	+12.78%	-4.06%
2011	0.00%	+2.40%

Data sources:

S&P 500 historical data: Yahoo Finance, S&P Dow Jones Indices LLC

US Philanthropy data: Giving USA Annual Reports (2000-2023), Indiana University Lilly Family School of Philanthropy

# Old Ask vs The Collaborative Ask: The Seven Shifts You Have To Make

- 
1. Money vs. Possibilities
  2. Organization-centered vs. Donor-centered
  3. Formal Pitch vs. Informal Questions
  4. Fast vs. Slow
  5. Pushy vs. Permission
  6. Intellectual vs. Heart-Centered
  7. You Put Yourself in Charge vs. Donor is in Charge

# Mone

vs.

# Possibilities



# Organization-Centered

vs.

# Donor-Centered





**It's all about what  
your donor thinks...  
and feels...and wants  
to accomplish.**

# Formal vs. Informal Questions

## Pitch



**Today's donors are less patient with:**

**pitching or selling  
or "arm twisting"**

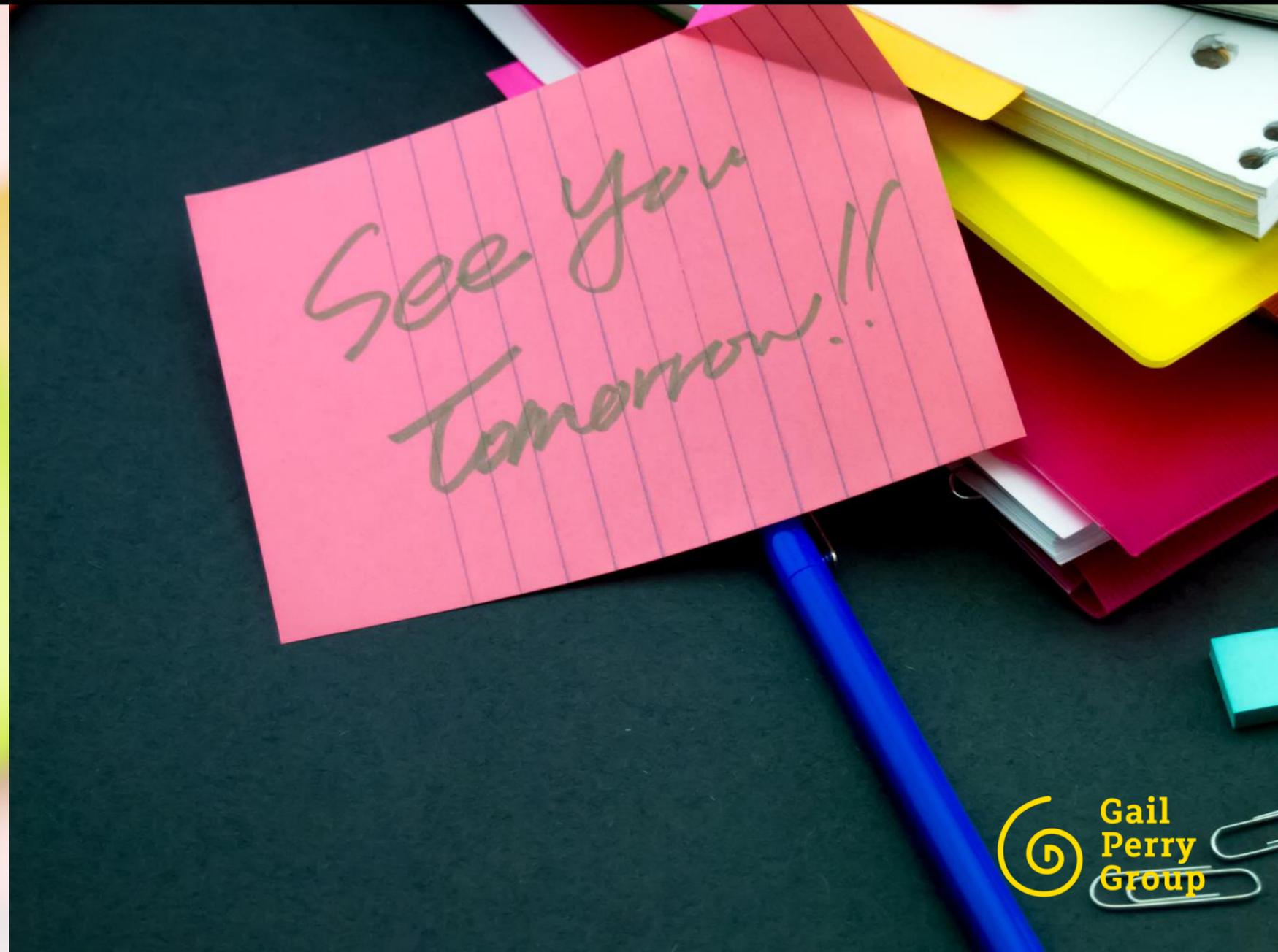


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**Fast**  
**(one-shot ask)**

vs.

**Slow**  
**(multiple conversations)**



***“You have to listen to their story,  
go with the flow – and *don’t be shy to  
propose something* – it opens new  
doors and opportunities.”***

Patrick Berard, CEO

Hema Quebec Foundation

Major Gifts Intensive

# Push

vs.

# Permission

y



# Intellectual vs. Heart-Centered





Listening, engaging and  
finding out the donor's  
story -

**The key to their gift!**

**You Try To Be In  
Charge**

**vs.**

**Donor Is in  
Charge**



# The Collaborative Ask - Donor Power Questions

## HANDOUT

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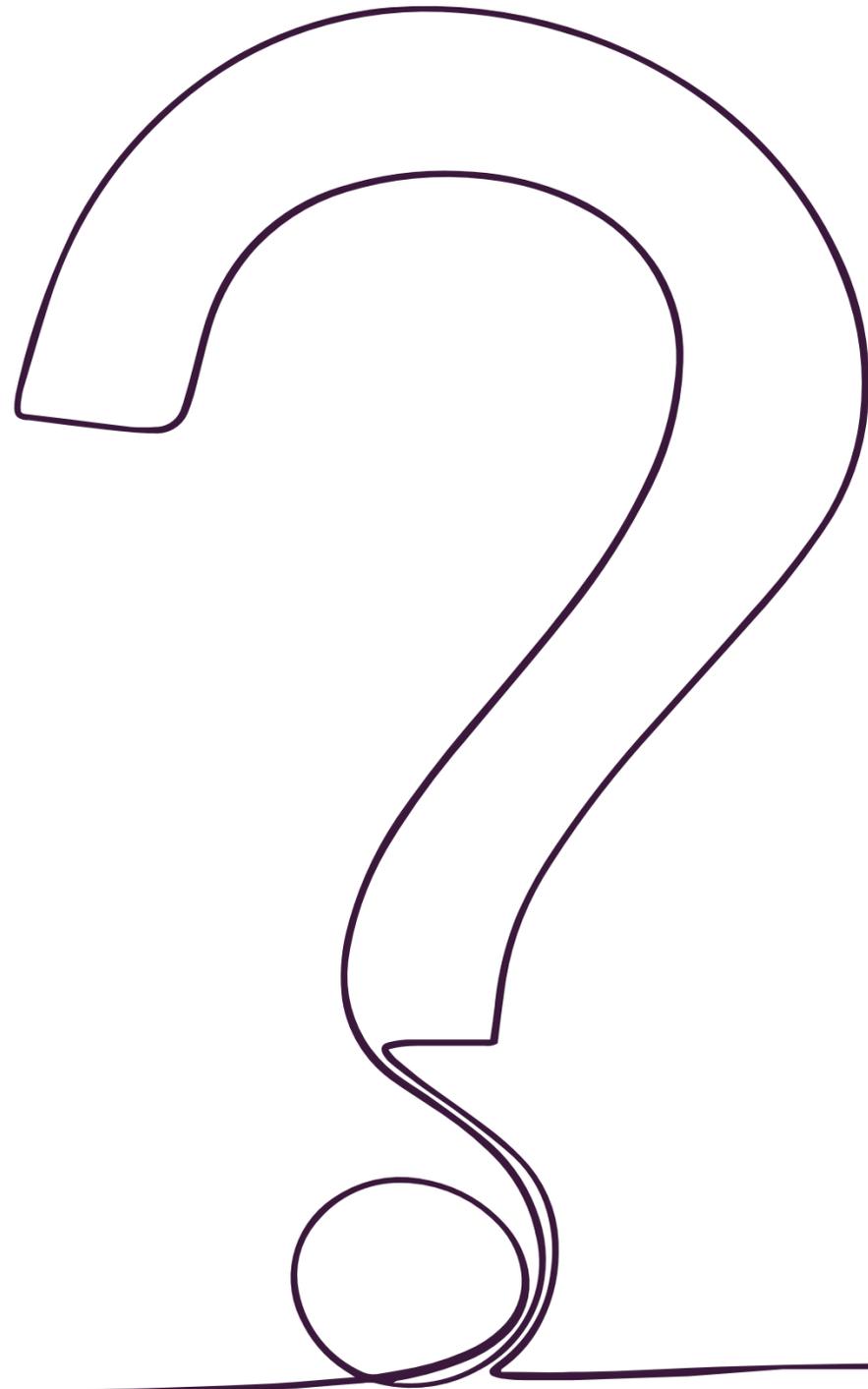
### Scan Now

10 POWER QUESTIONS  
THAT LEAD TO A  
CONVERSATIONAL ASK

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## 1. The DONOR STORY:

“May I ask, how did you come to be a donor to our organization?”

<sup>26</sup>



“I’d love to know  
**your story.**”

“What **inspired**  
**your gift?**”

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**I love your  
organization  
because of my  
mother...**



**The Donor Story –**  
helps you discover what she really  
believes in!

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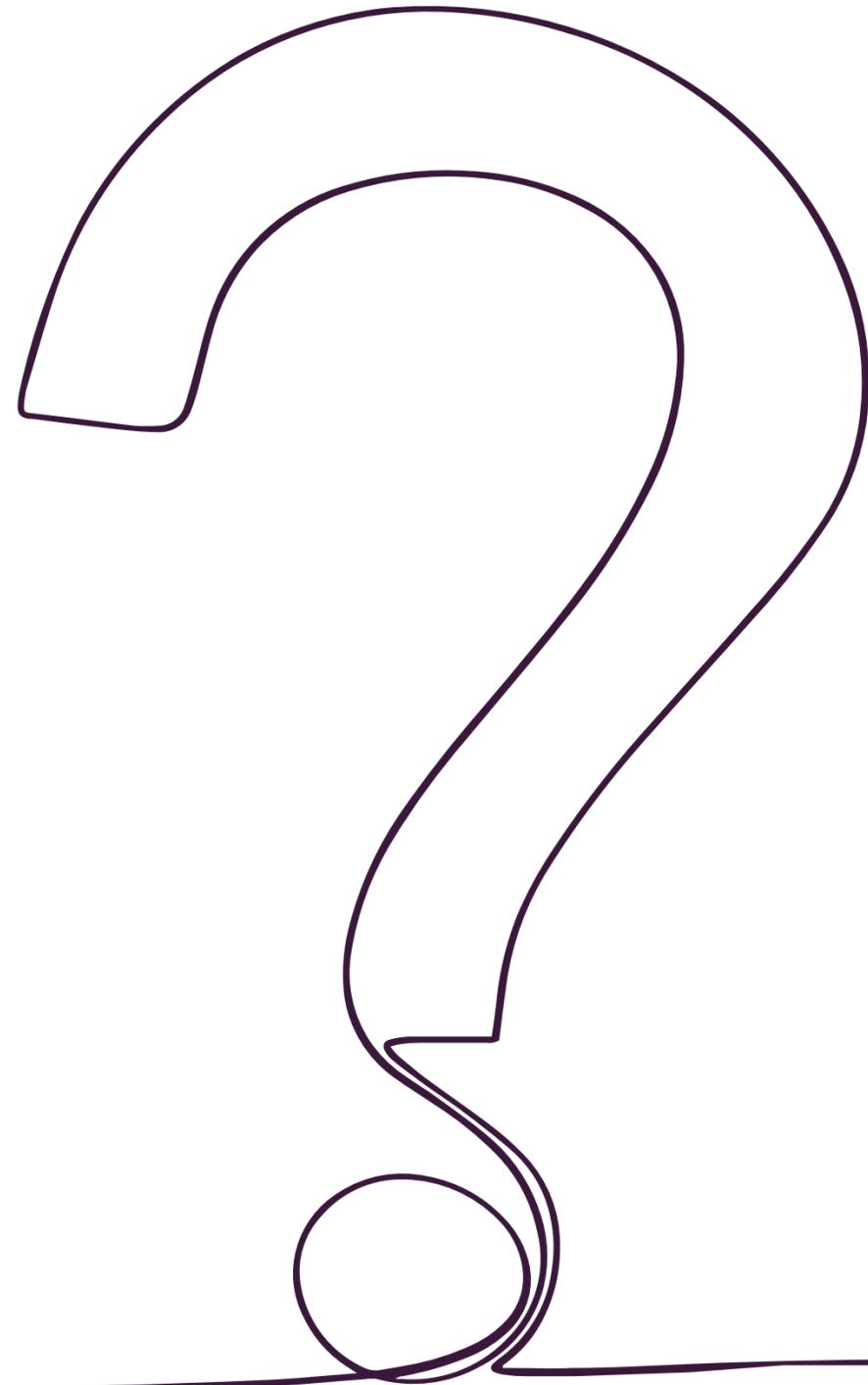
“I asked my donor how he came to be so generous, and I walked out with a \$5k gift!”

**Diane Fuller**  
The Fuller Center for  
Housing, Inc.

~ Major Gifts Intensive participant

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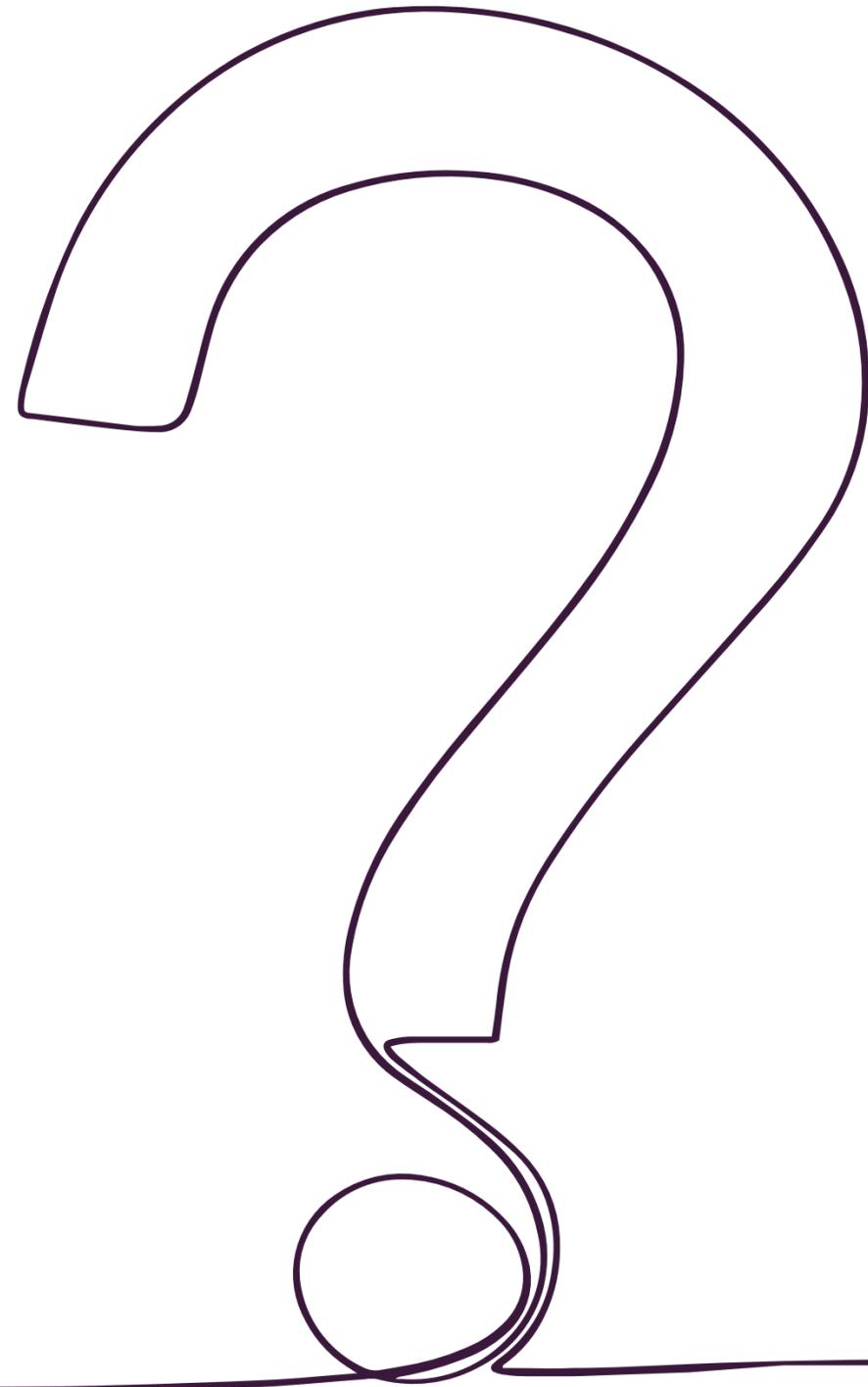


## **2. What area of our work most resonates with you?**

Or,  
what has been the most meaningful aspect of your involvement with us?



**Exercise: What are  
your top 10 donors  
most passionate  
about?**



**3. Could you see yourself becoming more involved with our organization?**

## 4. Ask for Advice and What They Think

Can I pick  
your brain?

What are your  
impressions?

I'd love  
your opinion.

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If you want money, ask for advice.  
If you want advice, ask for money.

**We asked our top donor:**  
“We’d like your input on our business plan.” We walked out with a \$1.5 million challenge gift!

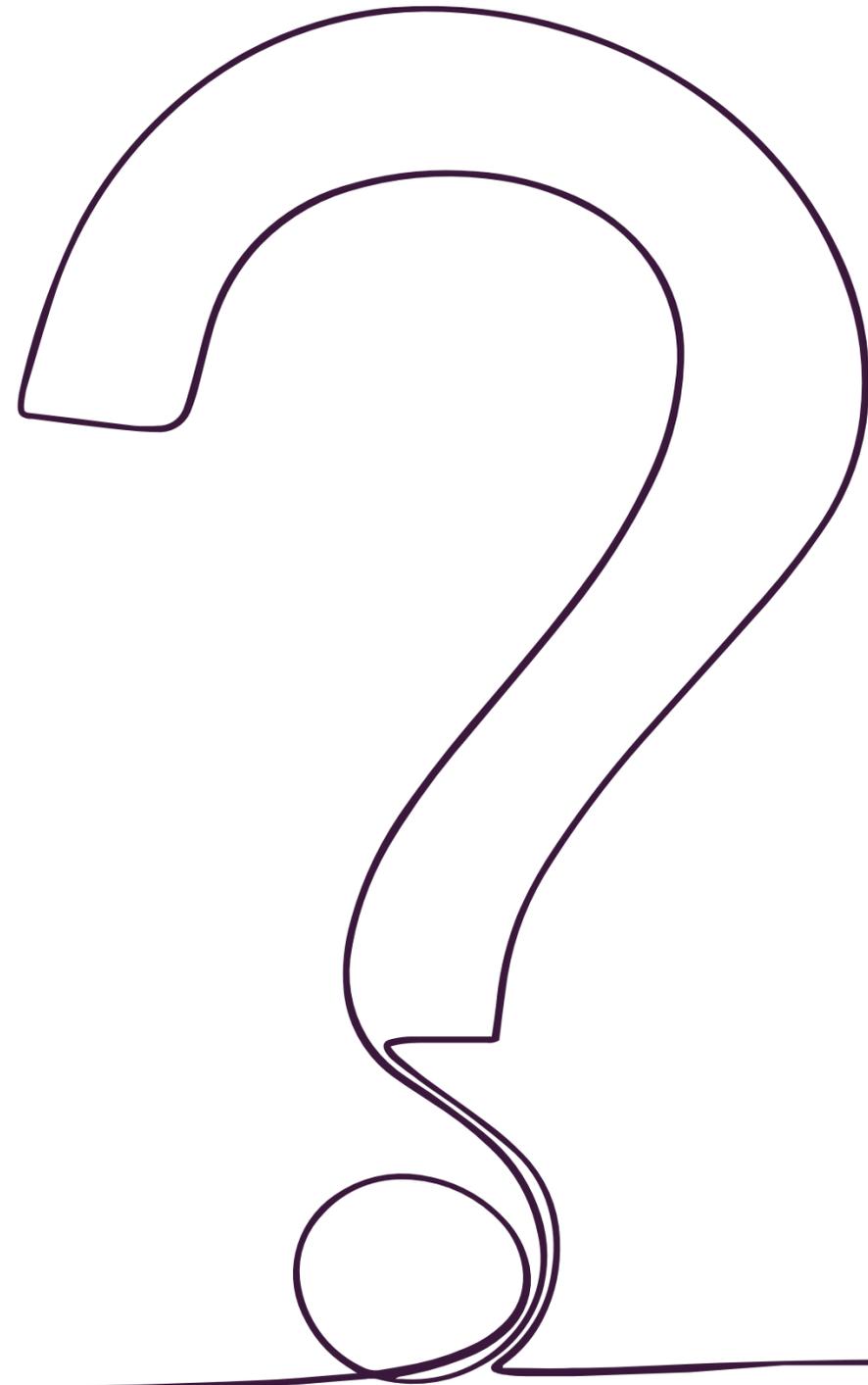
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*Indraloka*  
ANIMAL SANCTUARY

~ Major Gifts Intensive participant





**5. Would you like to know more about how you can help?**

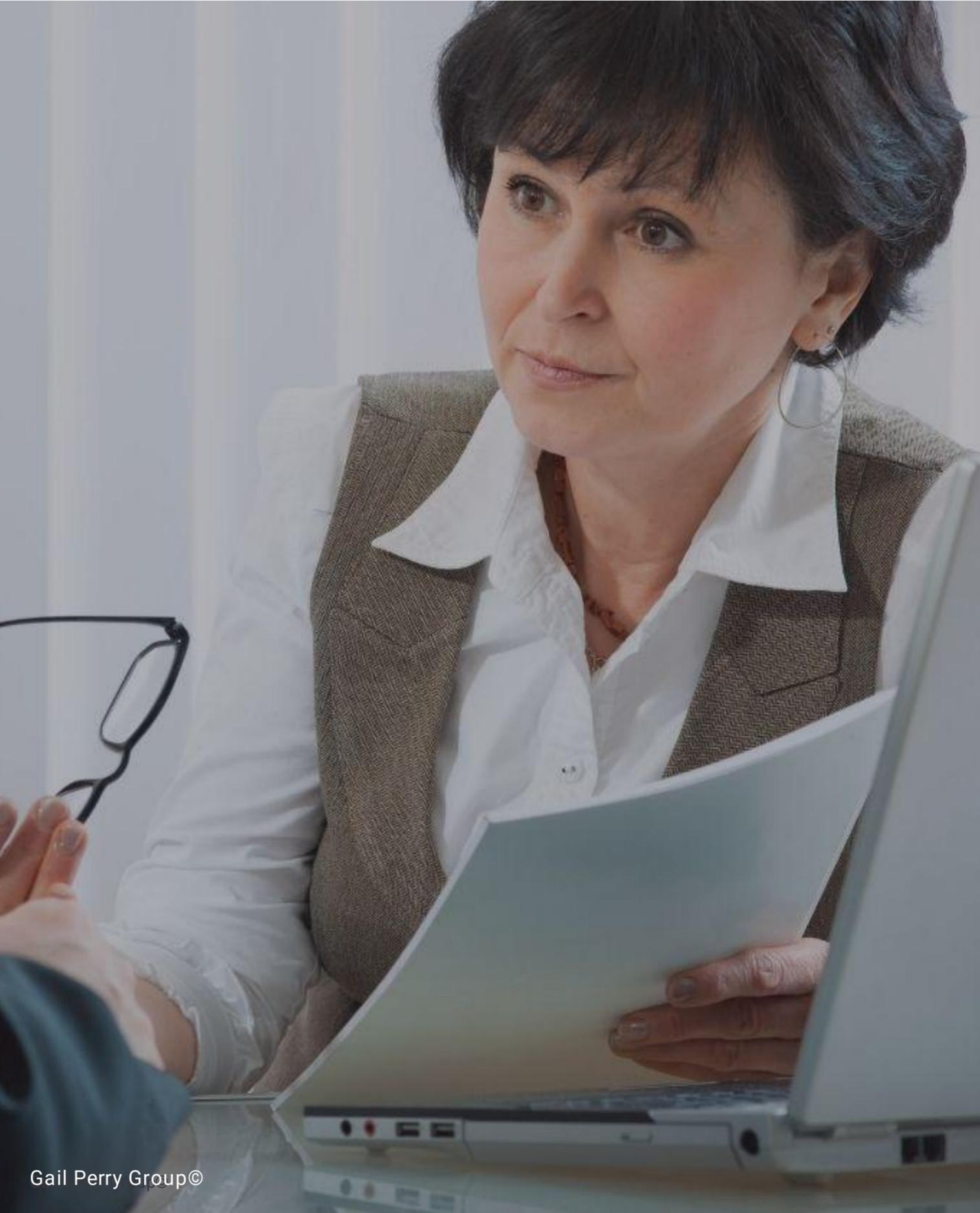
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**Use Permission!**

# Moving Seamlessly into a Gift Conversation

- Would you share what **part of our work resonates** most with you/ your family?
- May I hear more about **your interest in...**
- Could you **see yourself becoming more involved** with our organization?
- Would you like to know more **about how you could impact** your favorite area of our work?
- If you made a gift, **what might you like to accomplish?**





**6. “Is this a good time to discuss your support of our project?”**

“If you ever made a gift, what would you like to accomplish?”

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1. Donor Story: “How did you come to be a donor?”
2. What resonates with you the most?
3. “Could you see yourself becoming more involved?”
4. Ask for advice and input.
5. “Would you like to know more about how you can help?”
6. “Would this be a good time to discuss your support?”

And the donor said:

***"You have made me feel heard. I didn't feel  
that way before.  
I want to donate \$100k in support of your new  
leadership."***



“Gail, I was always focused on the **relationship building**, the **listening**, the **gratitude**, asking for her **advice** and letting her know the amazing **difference** her previous gift had made. And it really paid off!”

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## **Odessa Dwarika, M.A.**

Executive Director,  
Jhamtse International  
Major Gifts Intensive

# The Collaborative Ask - Donor Power Questions

## HANDOUT

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### Scan Now

10 POWER QUESTIONS  
THAT LEAD TO A  
CONVERSATIONAL ASK

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# Your Takeaways!

- The Seven Shifts You Have to Make
- Steps in the Gift Conversation
  - Their Donor Story
  - What resonates with them most?
  - Want to get more involved?
  - Ask for advice
  - Would you like to know how you can<sup>42</sup> help?
  - Is this a good time to discuss your support?

# Capital Campaigns, Fundraising Strategy

[www.gailperrygroup.com](http://www.gailperrygroup.com)

**Gail Perry**

✉ [Gail.p@gailperry.com](mailto:Gail.p@gailperry.com)

🐦 [@gailperrync](https://twitter.com/gailperrync)

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“Thank you for sharing a ton of invaluable information today. I am writing a report to share with my team!”

“This was seriously one of the best webinars that I have attended. It was relevant, packed with great information, lots of energy, and lots of great questions from the attendees.”

onecause® WEBINAR

10 Ways to Raise More with Less Effort on the OneCause Fundraising Platform

WEDNESDAY, MAY 14, 2025

**Joe Duca**  
VP Product Strategy  
OneCause

**Steve Lausch**  
Director of Product Marketing  
OneCause

onecause® WEBINAR

CFRE

**The Power of Gratitude:**  
Unlocking the True Magic of Thanking for Your Nonprofit

WEDNESDAY, JUNE 11, 2025

**Lisa B. Sargent**  
Principal  
Sargent Communications



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# Thank you!

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Full participation in *The Collaborative Ask: A Paradigm-Shifting Approach to Mega Gifts* presented by OneCause for 1.0 points in Category 1.B - Education of the CFRE International Application for initial certification and/or recertification.

Recording and presentation slides will be emailed to all webinar registrants.



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