




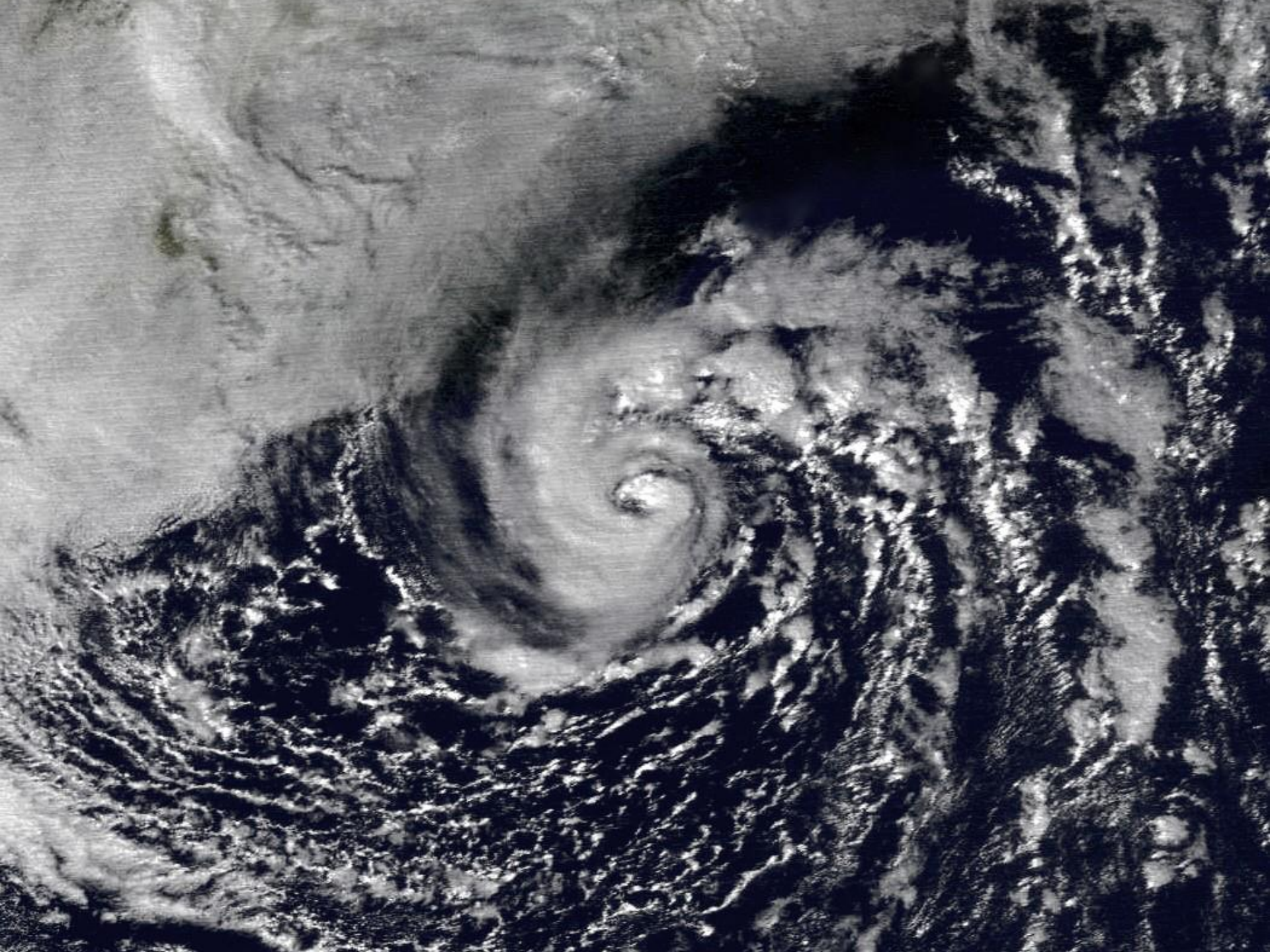
Major Donor Fundraising: If not now, then when?



A large, leafy tree stands on a grassy hill under a bright sky. The tree is the central focus, with its branches spreading out. The grass is green and textured. The sky is bright with some clouds. The text is overlaid on the image in a large, bold, black font.

**“Someone’s sitting in
the shade today
because someone
planted a tree a long
time ago.”**

Warren Buffett





Civil Society @CivilSocietyUK · Apr 24

...

✎ The value of charitable donations in the UK fell by more than half last year, to £4.3bn, according to a new report civilsociety.co.uk/news/charity-d...





Charities Aid Foundation UK Giving Report 2022

Who are “the rich?”







- 
- 1. Careful tax planning**
- 2. Property**
- 3. Business ownership**
- 4. Investments**
- 5. Private equity & venture capital**





**BEACON
COLLABORATIVE
GROWING
PHILANTHROPY
IN THE UK**

Beacon Collaborative

- Since 2020 more wealthy people are giving, and are giving more
- Giving is growing fastest among those with assets over £5 million
- Generosity among wealthy people is increasing
- The most generous think hardest about their giving

<https://www.beaconcollaborative.org.uk/new-data-shows-philanthropy-is-growing-in-the-uk/>

RICH LIST 2021





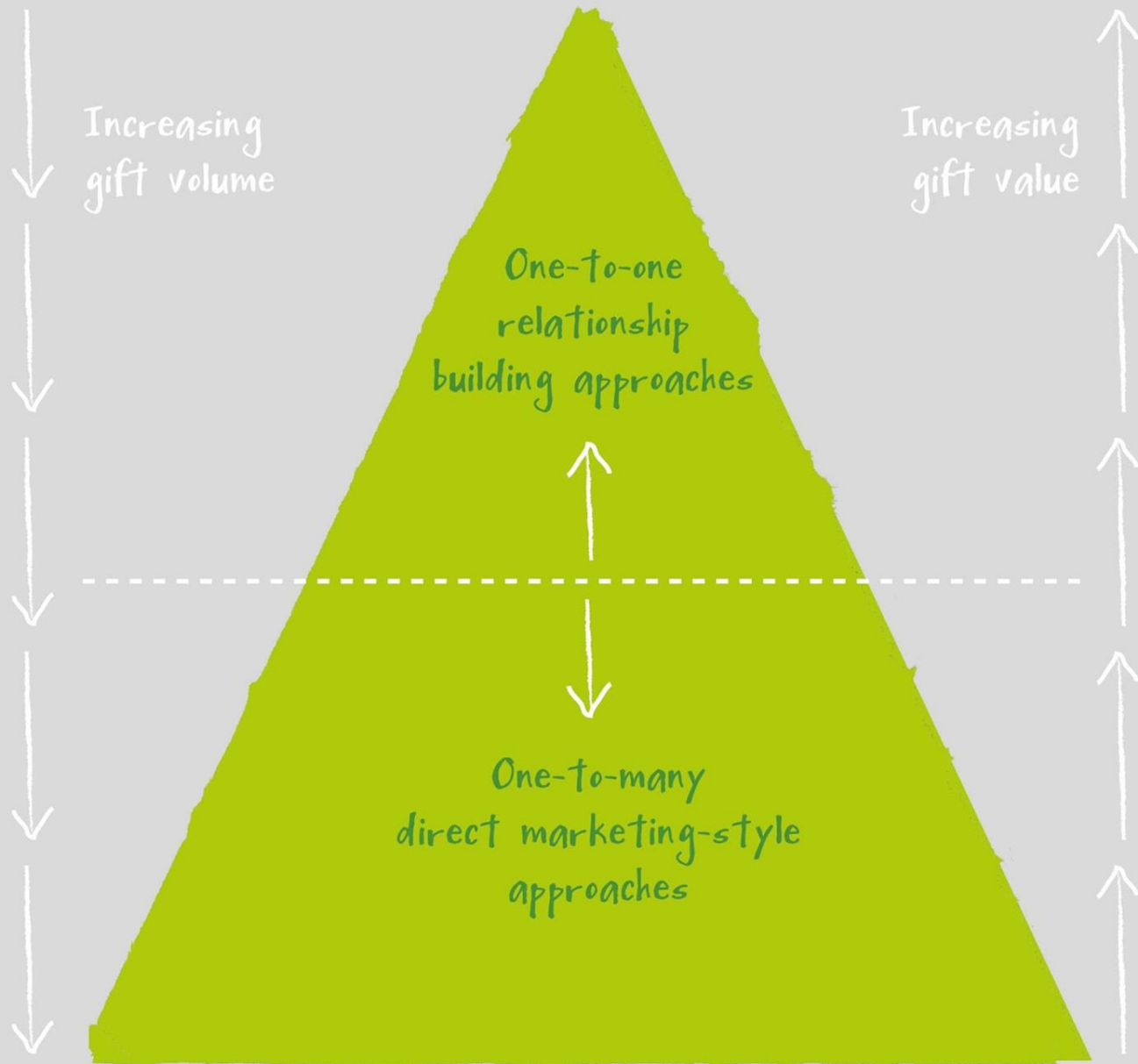
Why Now?

- They want to help
- They can afford to help
- We are the experts in the problems we set out to solve, not them
- Nobody gives unless they are asked

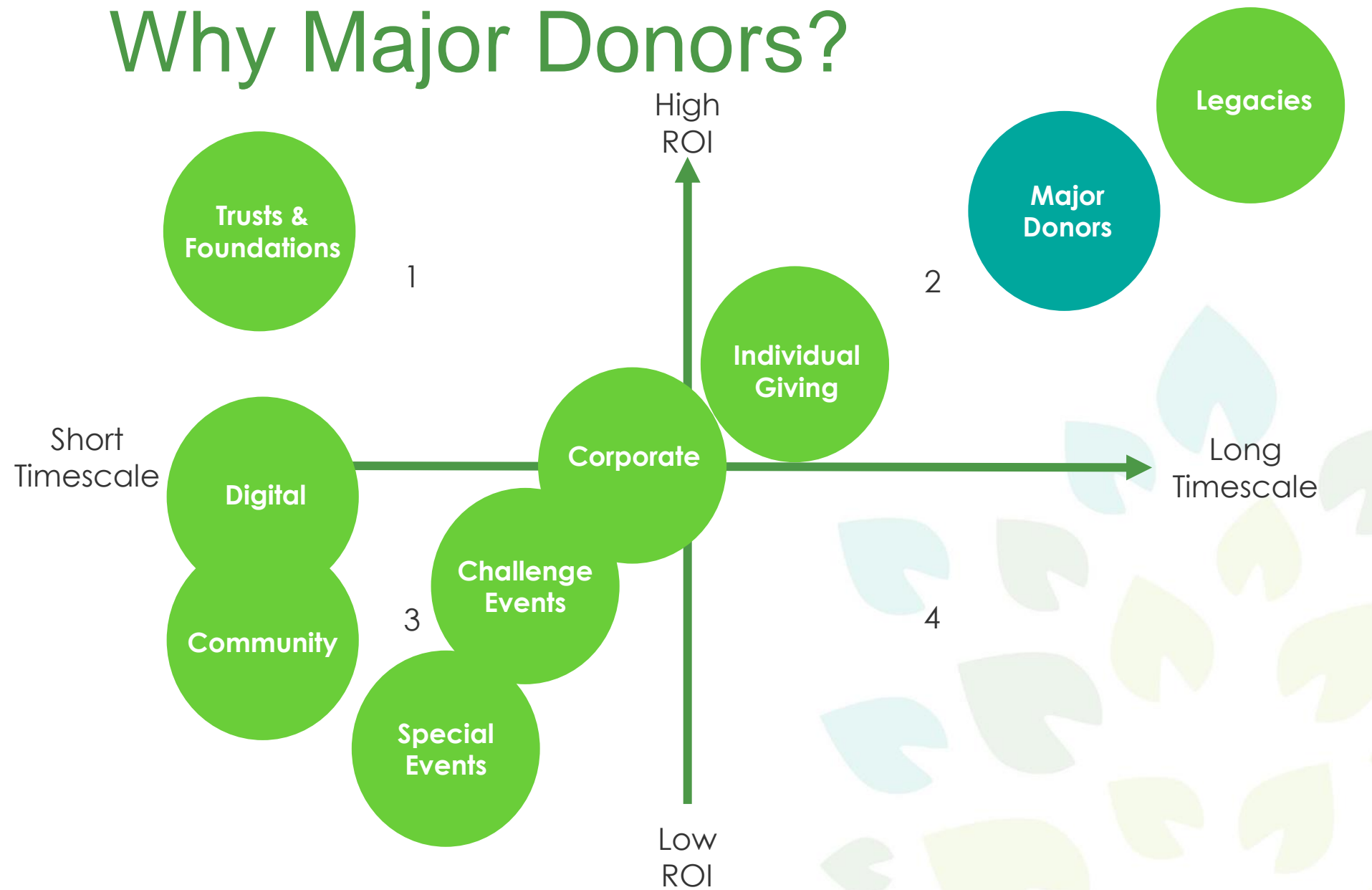




What does major donor fundraising take?

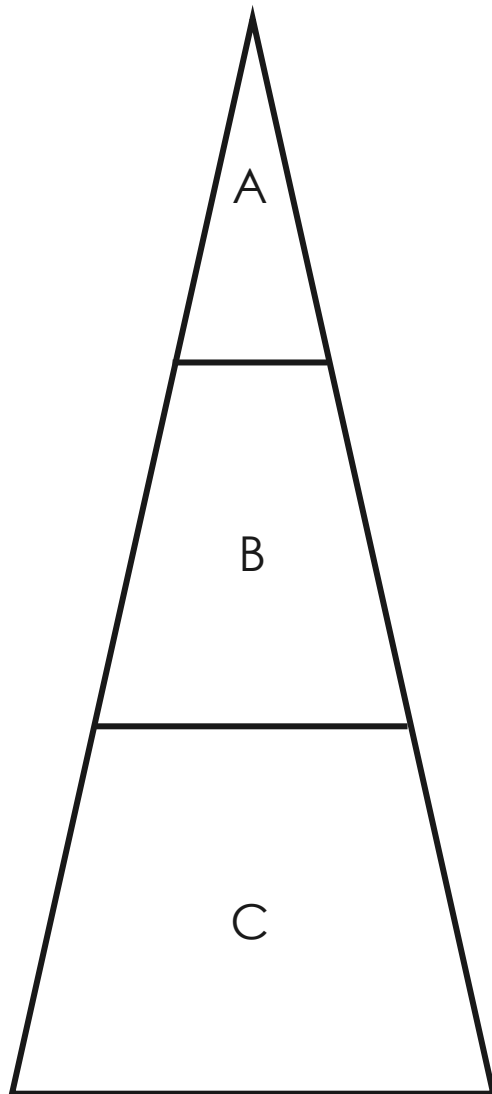


Why Major Donors?



Why major donors?

Pyramid



Count

10%

40%

50%

% Effort

50%

30%

20%

Strategy

Strategic Moves Very personal

Tactical Moves Less Personal

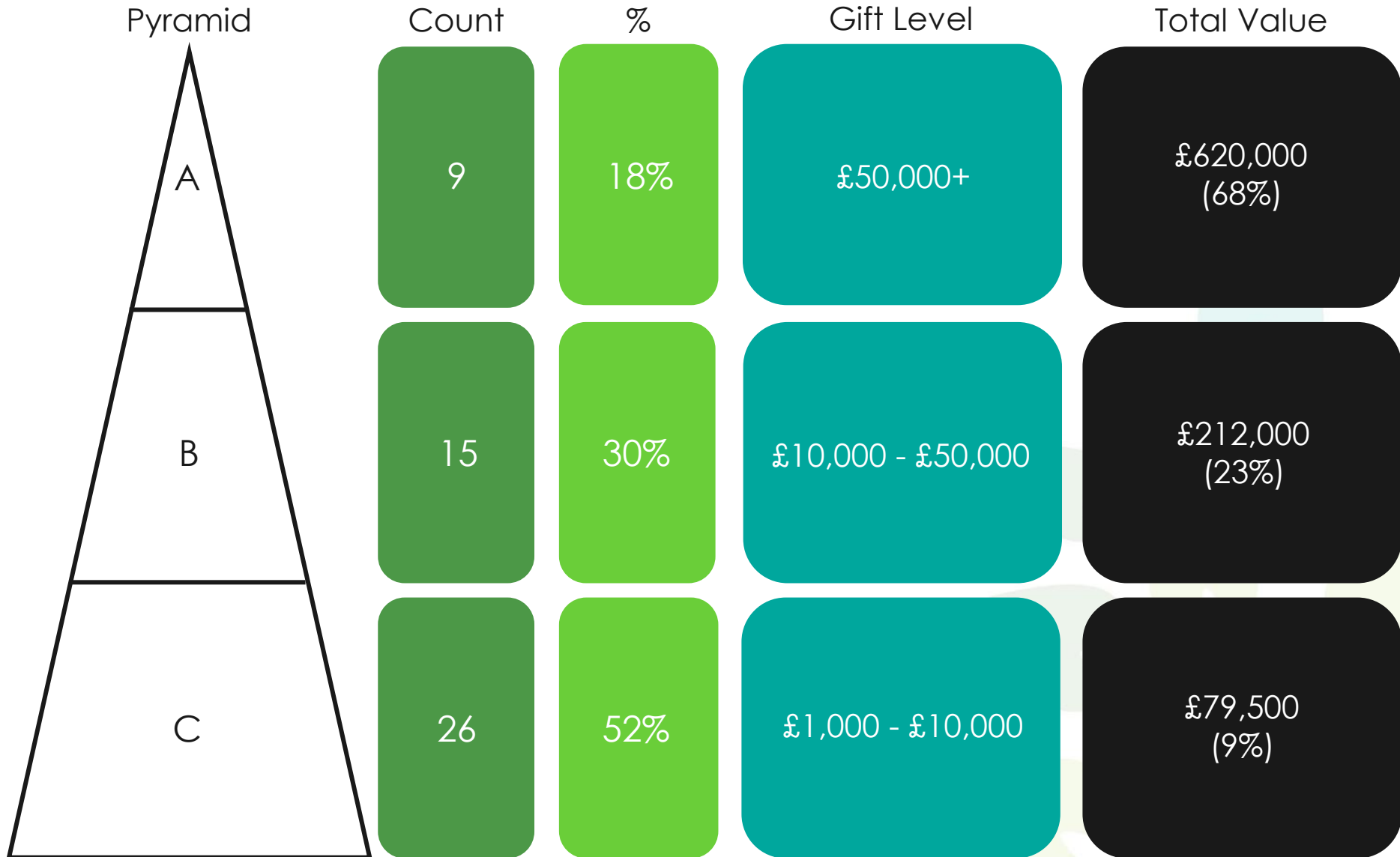
Outcomes

6 & 7 figure gifts
Retention
Repeat giving

5 figure gifts
Major upgrading
Retention
Repeat giving

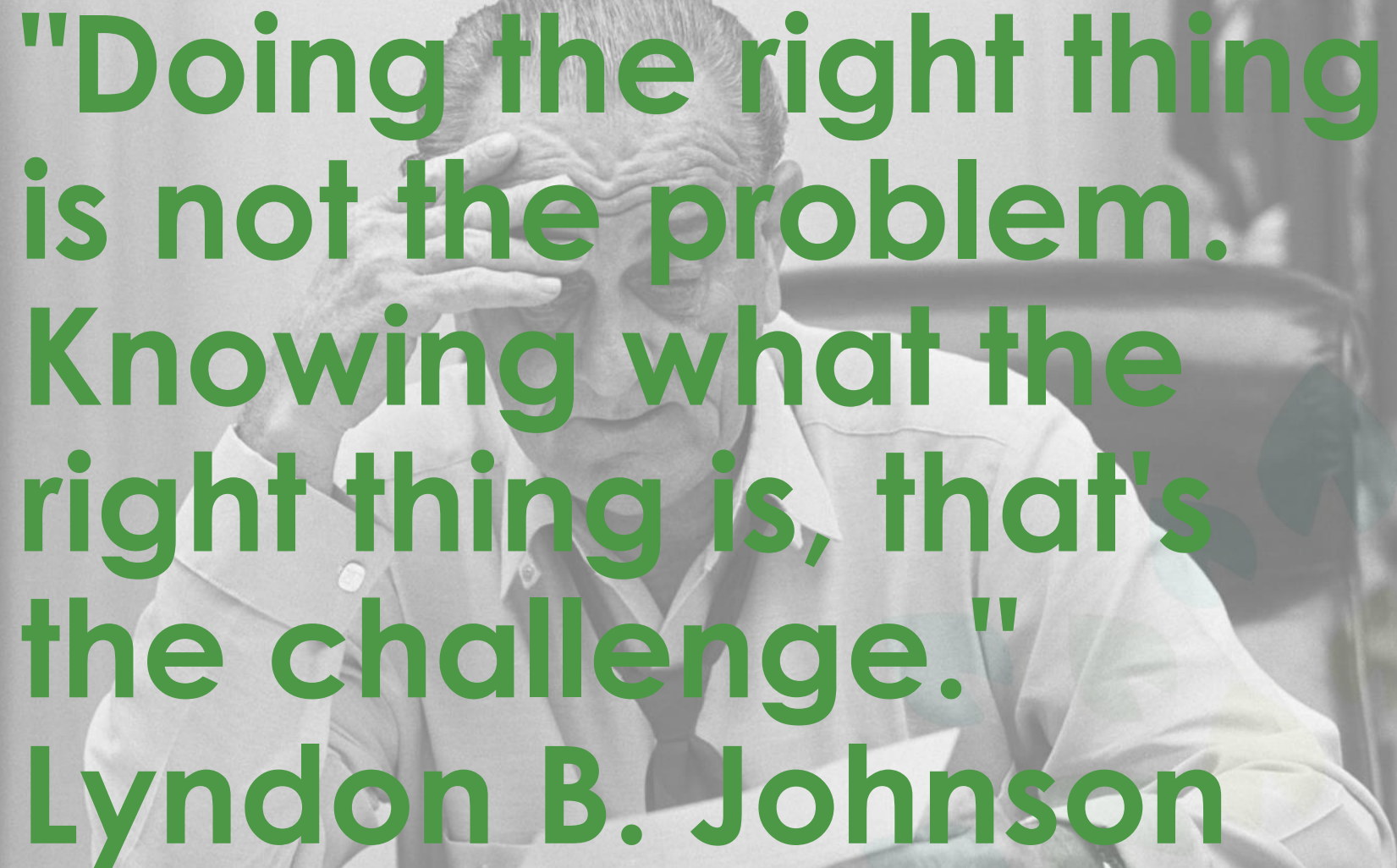
3 to 4 figure gifts
Retention
Repeat giving

How much do they give?



Expectations



A black and white photograph of a man in a light-colored suit and dark tie, sitting at a desk. He is covering his face with his right hand, suggesting distress or frustration. On the desk in front of him are several sheets of paper, a pair of glasses, and a small container. The background is slightly blurred, showing an office environment.

**"Doing the right thing
is not the problem.
Knowing what the
right thing is, that's
the challenge."
Lyndon B. Johnson**



MISSION
Why do we exist at all?

VISION
What is it that we wish to accomplish?
<5 years?>

**STRATEGIC
GOAL #1**

**STRATEGIC
GOAL #2**

**STRATEGIC
GOAL #3**

**ALIGNED
PROJECT#1**

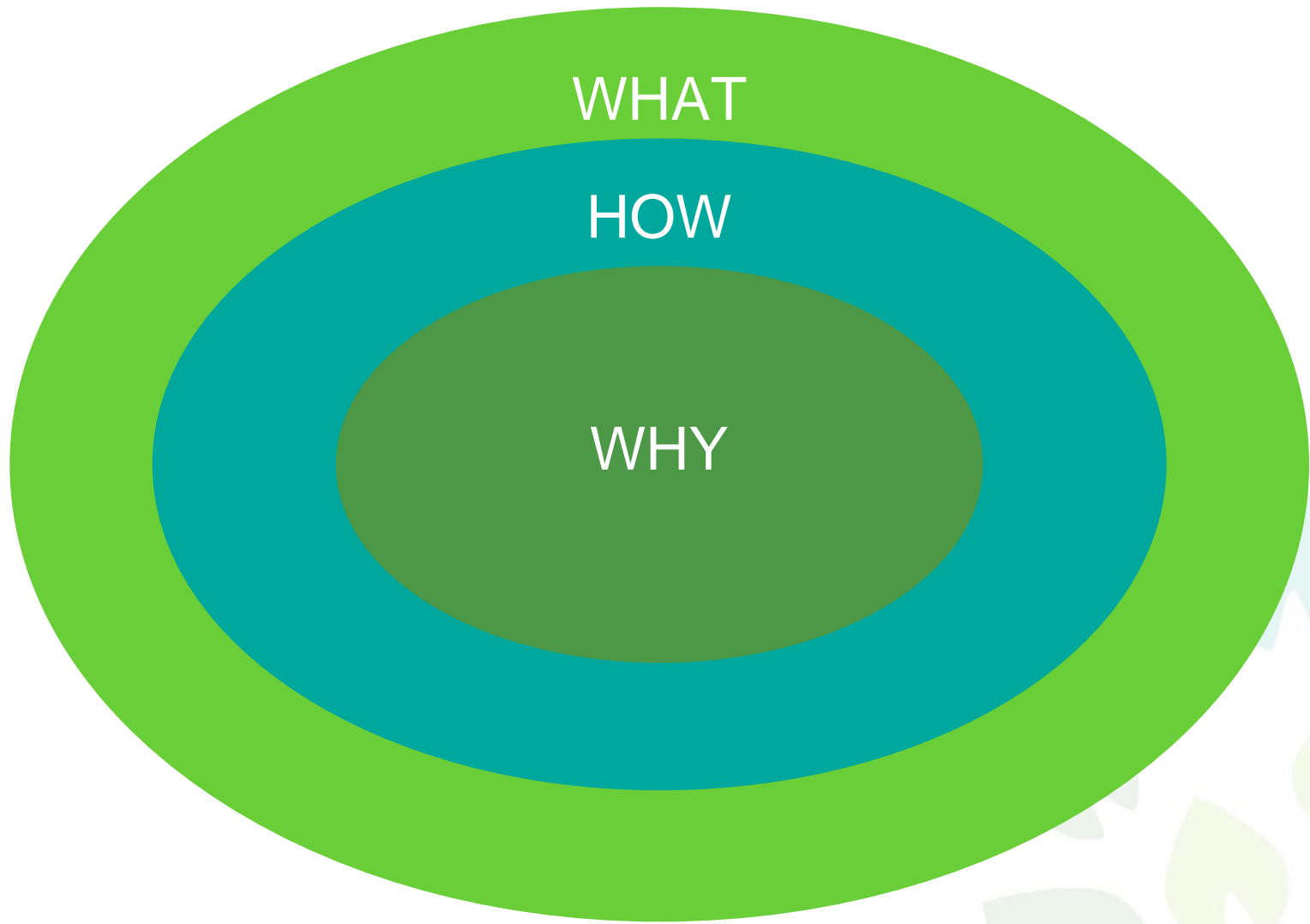
**ALIGNED
PROJECT#2**

**ALIGNED
PROJECT#3**

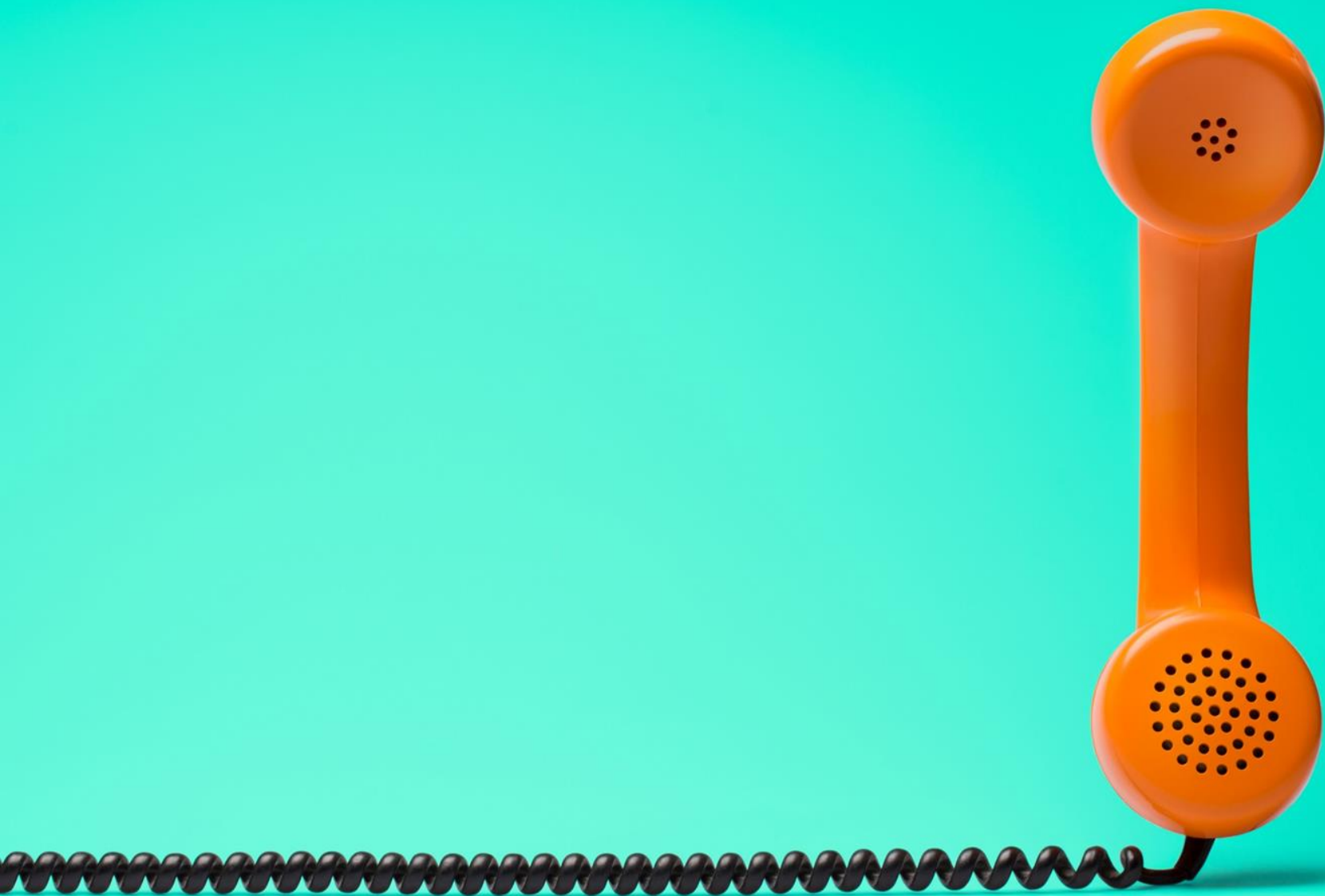









https://www.ted.com/talks/simon_sinek_how_great_leaders_inspire_action/c



A close-up portrait of Maya Angelou. She has short, curly grey hair and is looking directly at the camera with a slight smile. She is wearing a black top, a large pearl earring, a pearl necklace, and a gold watch. Her right hand is resting on her head. In the background, a lamp with a pleated shade is visible.

**I've learned that people will forget
what you said, people will forget what
you did, but people will never forget
how you made them feel.
Maya Angelou**



Identifying and recording major donors

- New £300+
- Payments from private banks
- Public honours
- Google map postcodes
- Neighbours of donors
- Patterns of giving
- Job titles



Qualify and Disqualify

1. Size of gift

The bigger the better

2. Recency of Gift

Recent is better

3. Pattern of giving

Multiple gifts/upgrading

4. Capacity

The bigger the better

5. Connection

How many degrees of separation are you?

6. Interest

Have they shown any?



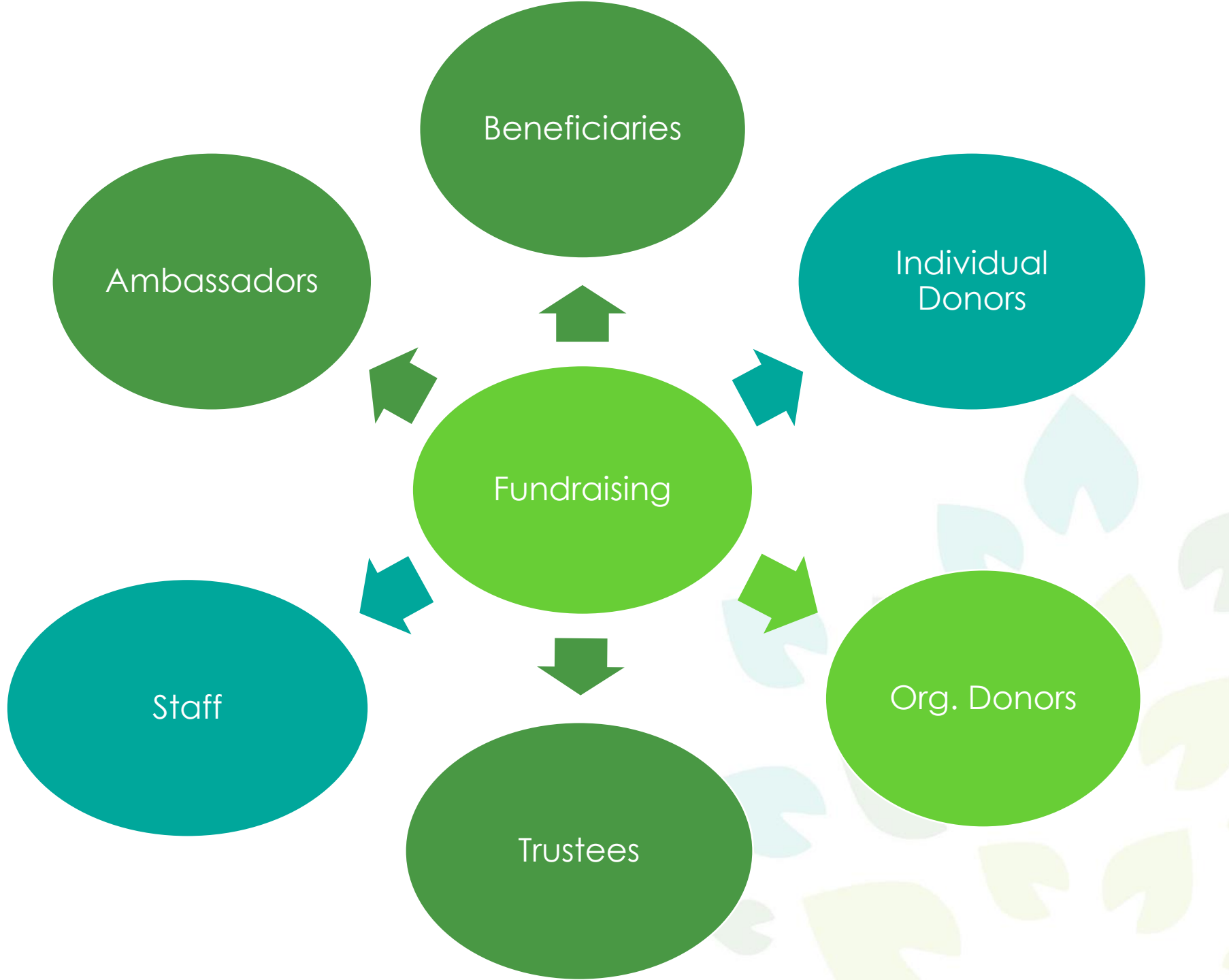
Knowledge is power.





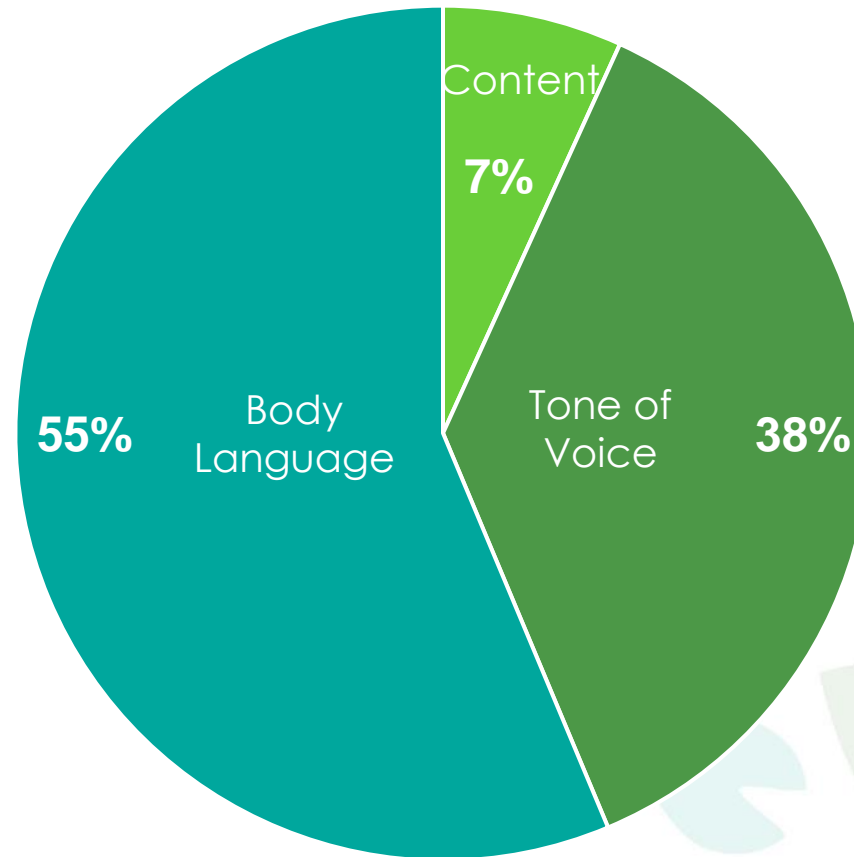
"A wise old owl
lived in an oak.
The more he saw
the less he spoke.
The less he spoke
the more he
heard. Why can't
we all be like that
wise old bird?"
English Nursery
Rhyme







Hierarchy of Interactions



Fast forward 50 years...

How much more successful is face-to-face compared to email, really?

34 times





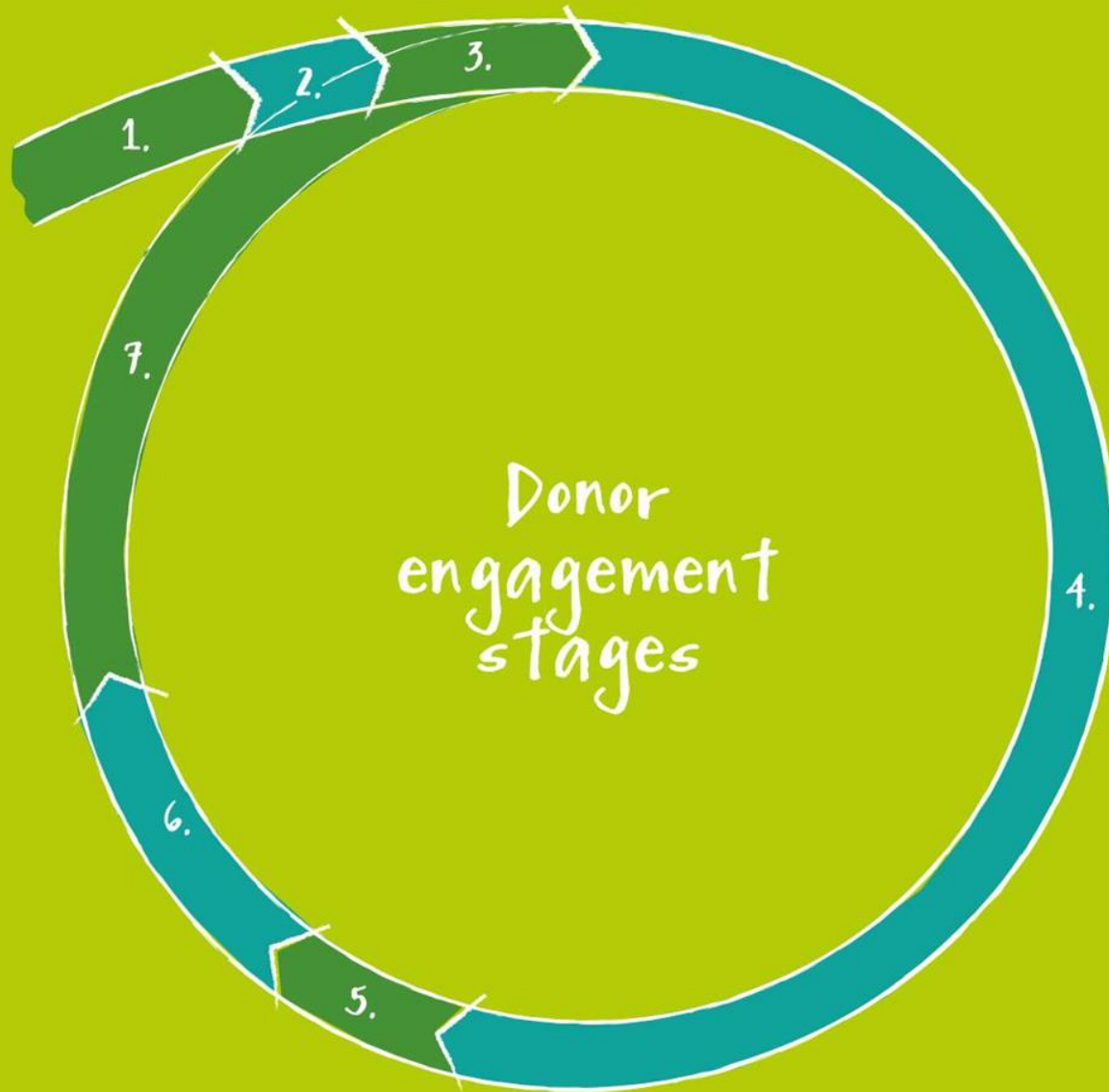
Prospect Name	Date Updated
Staff Lead	Leadership Lead
Capacity	Other Leadership Contacts
[insert range]	1
Target (min): £	2
Target (max): £	3
Propensity	Interests (linked to project)
	1
	2
	3
Proximity	Needs/Concerns
Final Plan	
Who will ask?	
Who needs to be present (on our side)?	
Who needs to be present (on their side)?	
Where?	
Target ask	
Target ask date	
Area of work?	
Mechanism of ask	
Action Plan	

Asking Checklist

When?	Right Time
Where?	Right place
What for?	Right project
How much?	Right amount
Who?	Right asker
	Right home team
	Right donor team







1. Identify
2. Qualify
3. Approach
4. Cultivate
5. Ask
6. Thank
7. Steward





Passionate about dogs

Invite the dog

Really sociable

4

6

10

12

+2 years until RSVP yes

Giving Circle = £5k pa
= group of like-minded
people. Is making
friends

1

£200 pcm DD

7

8

Ball invitee

2

£300+ each Appeal

13

Next step:
Capital Appeal,
naming rights,
significant gift

Dog is a therapy dog

5

11

Wants to make
friends with like-
minded people

3

£2k London Marathon sponsor

9

Generous
Auction bidder







Asking – the really important
thing to do





Asking

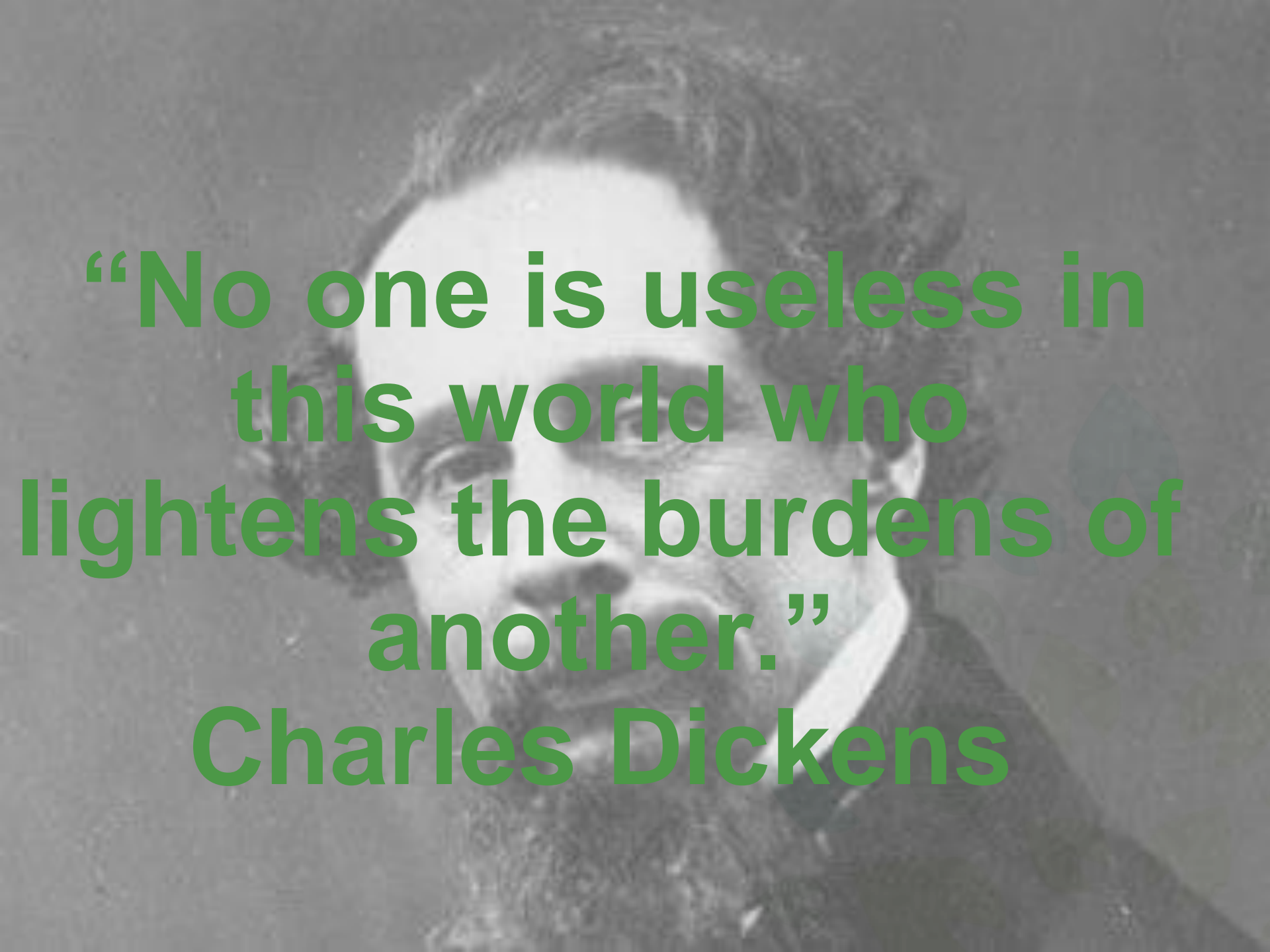
More than two-thirds (69%) of million £ donors said they'd listen to a request that comes from someone they know and respect

Only 31% respond to requests from fundraisers

Dr Beth Breeze, Director, Centre for Philanthropy, University of Kent







**“No one is useless in
this world who
lightens the burdens of
another.”**

Charles Dickens

