

The Art of Major Gift Fundraising

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Director
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*Helping arts, culture and heritage organisations
fundraise with confidence*



What does a
major donor
look like?

What does a Major Donor look like?





Welcome to Brighton Museum's new Elaine Evans Archaeology Gallery



How big is a
major gift?

Three types of major gift

- ① Exceptional for you
- ② Exceptional for the donor
- ③ Both!



Seven(ish) Steps


Seven(ish) Steps to Major Gift Success

1. Identify
2. Qualify
3. Plan
4. Cultivate
5. Ask
6. Close
7. Thank/Steward





Before you
begin



*If I had six hours
to chop down a tree,
I'd spend the first four hours
sharpening the axe.*

~ ~~Abraham Lincoln~~



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The Muggle Question:

What do I need
funding for?



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The Better Question:

Why?



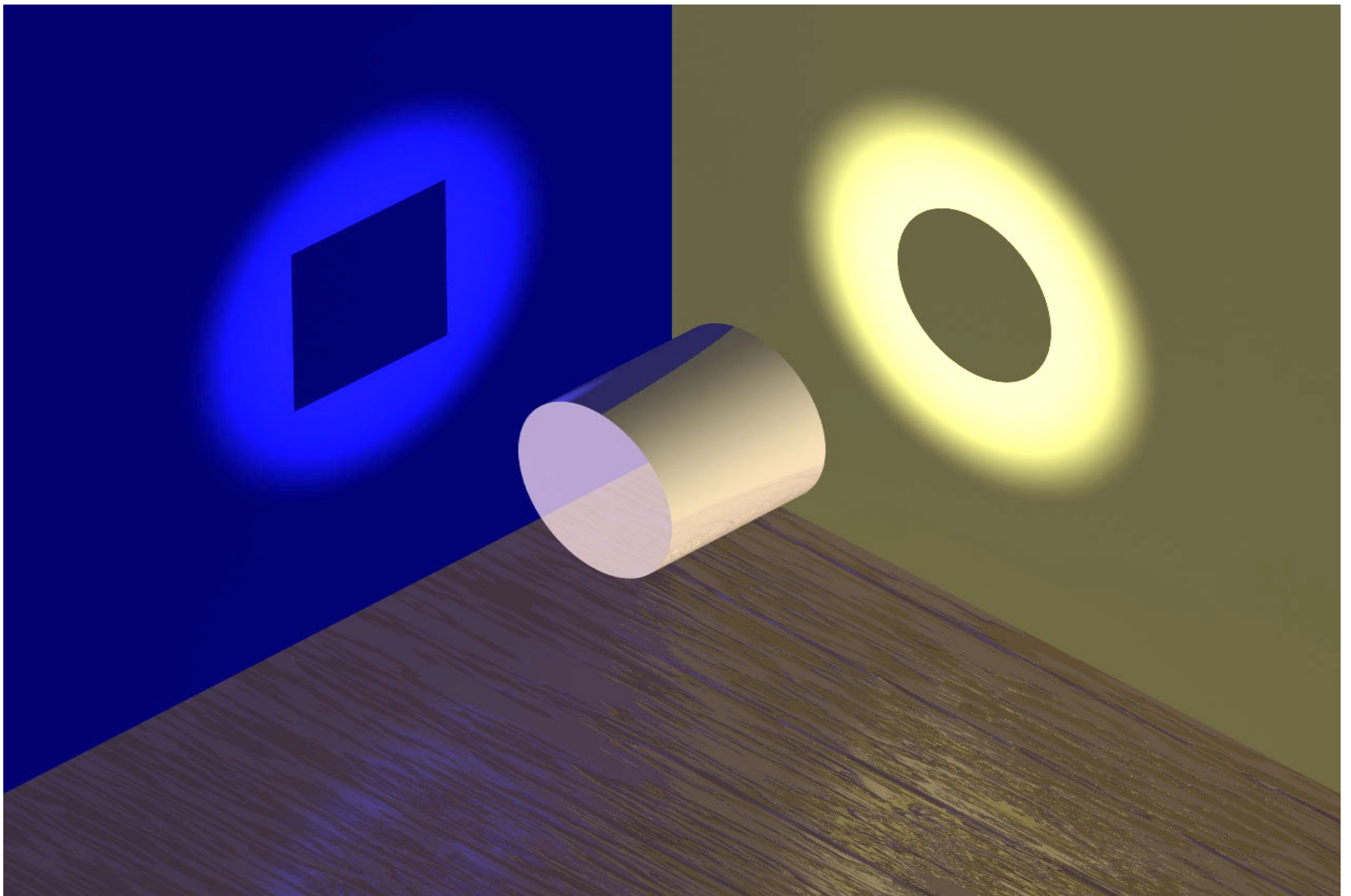
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Your Case for Support

- ④ Why is your project needed?
- ④ What problem(s) does it solve?
- ④ Why now?
- ④ **POSITIVE** consequences for heritage/people if done?
- ④ **NEGATIVE** consequences for heritage/people if not done?





Preservation of
Heritage?

Public Engagement
with Heritage?

Physical
Health?

Mental
Health?

Education?



Environmental?

Young people?

Older People?

Community
Cohesion?

Regeneration?

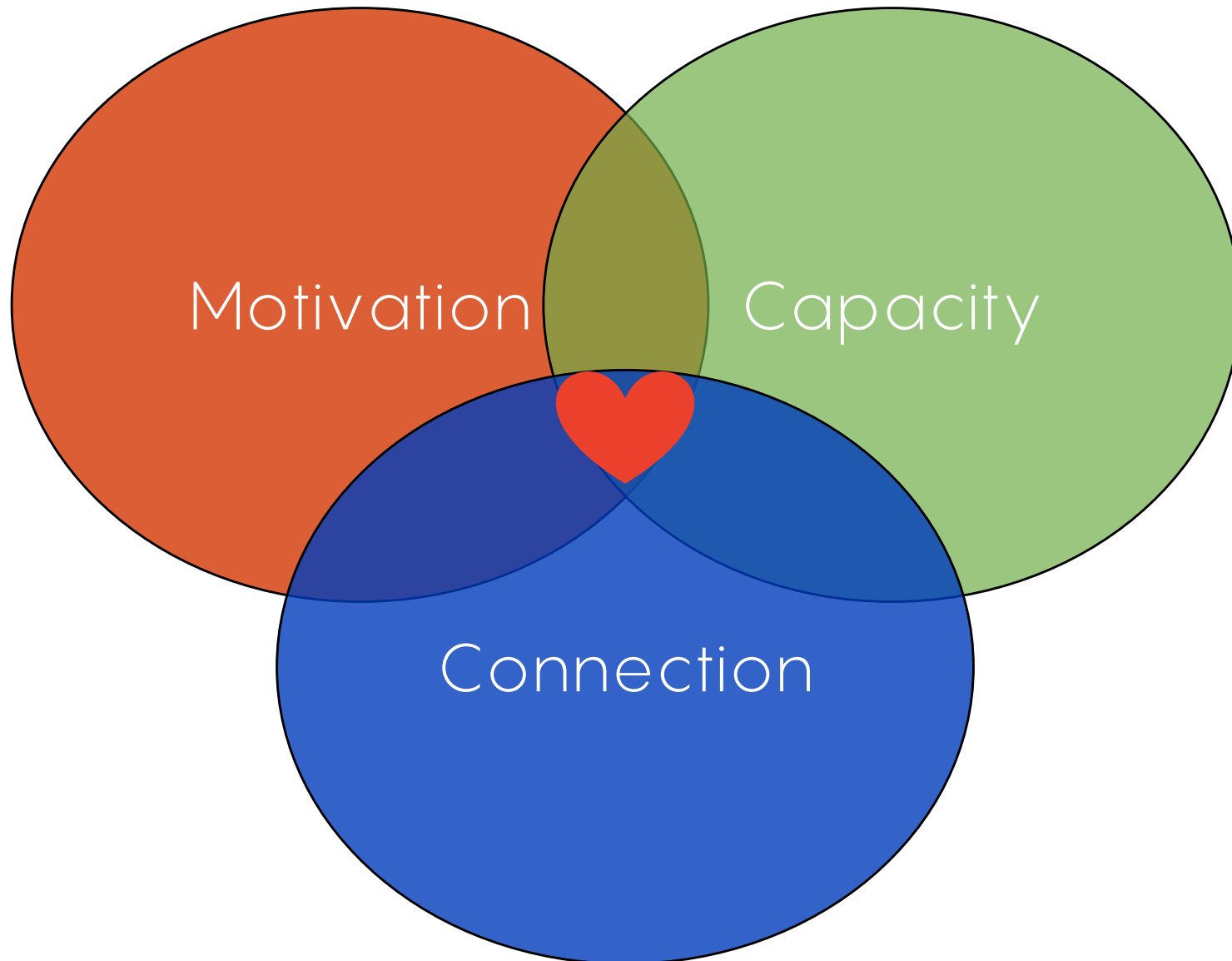
Social Welfare?

Supporting specific
groups /communities?



Step 1: Identify

Major Donor prospects must have...



“It is much easier to make someone who cares about your cause give you money than it is to make someone with money care about your cause.”

Rory Green



What motivates
people to make
big gifts?

Common Motivators

- ⊗ Connection to cause/organisation
- ⊗ Desire to make a big difference
- ⊗ Give something back
- ⊗ Peer pressure/social connection
- ⊗ Sense of duty — status/tradition
- ⊗ Religious belief
- ⊗ Personal identity
- ⊗ Local pride
- ⊗ Add meaning/purpose to life
- ⊗ Recognition/Be remembered
- ⊗ Tangible benefits — transactional
- ⊗ Tax benefits
- ⊗ Spite/Guilt/Rage
- ⊗ Avoid/Overturn negative PR
- ⊗ Enjoyment





So, how do
we find them?

Signs of Motivation?

- ⊗ Donations to you?
- ⊗ Donations to similar causes?
- ⊗ Personal/Family trust?
- ⊗ Charity board positions?
- ⊗ Fundraising committee positions?
- ⊗ Awards/Honours for charitable work?
- ⊗ High Sheriff/Lord Lieutenant?



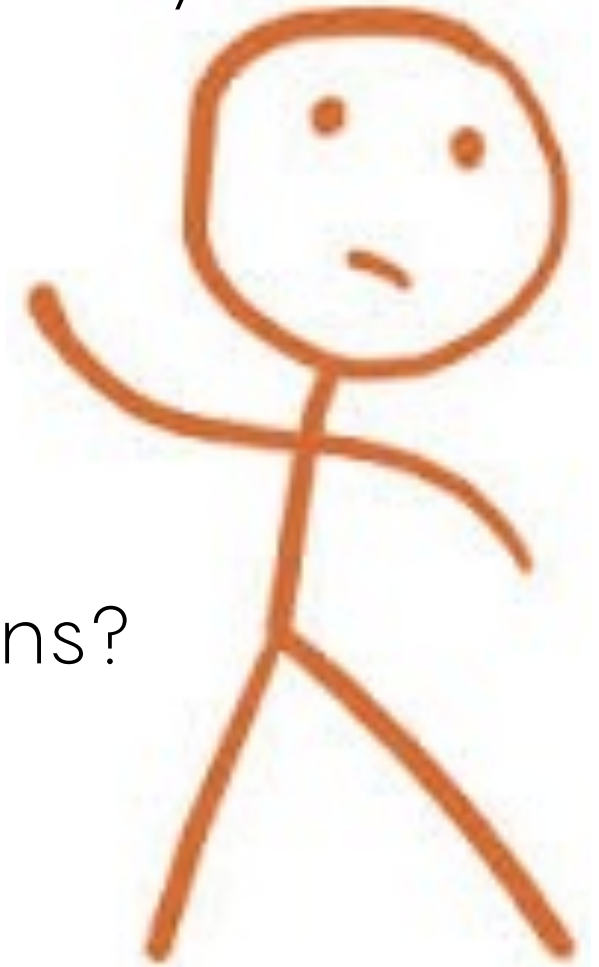
Signs of Connection?

- ⊗ Current/recent donor
- ⊗ Volunteer?
- ⊗ Ambassador?
- ⊗ Complainer?
- ⊗ Regular attender?
- ⊗ Update contact details?
- ⊗ Email open rate?
- ⊗ Social media engagement?
- ⊗ Personal connection to cause?
- ⊗ Peer connection with staff/board member/other donor?

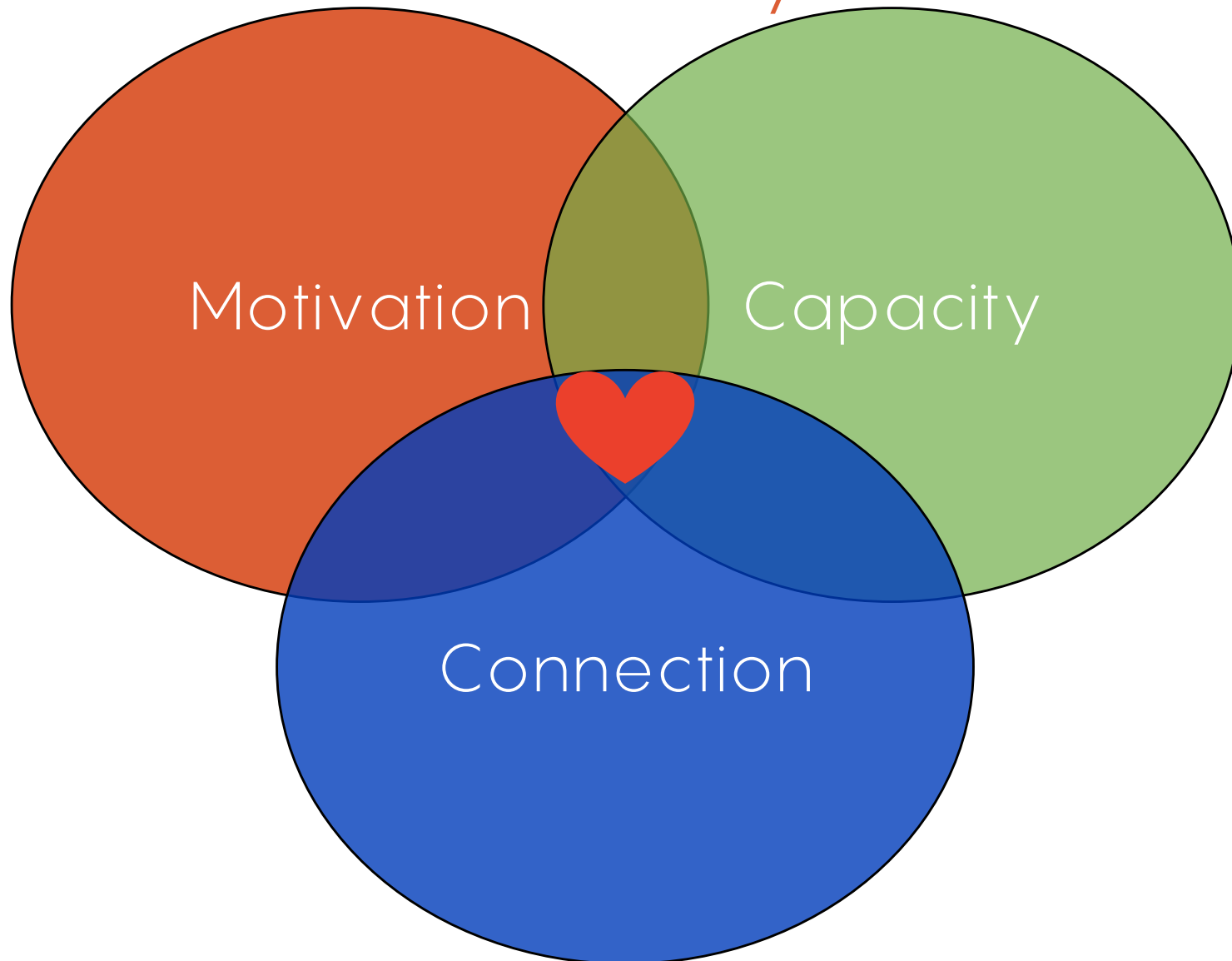


Signs of Capacity?

- ⊗ Larger than average donations to you?
- ⊗ Large donations to others?
- ⊗ Private banking account?
- ⊗ Postcode? House value?
- ⊗ Job Title? Senior Position?
- ⊗ Employment sector?
- ⊗ Stocks and shares?
- ⊗ Directorships? Business positions?
- ⊗ Rich List? Local Power List?
- ⊗ Other property or assets?
- ⊗ Club memberships?



Your best prospects are already
known to you!



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Prioritise

- ④ Start with people known to you
- ④ Then with people close to you with motivation
- ④ Then people with motivation who are further away

- ④ Then people with capacity

Commissioning Research



Wealth Screening



Prospect Screening

WA14 9AL

Postcode Analysis



Mosaic Analysis

Commissioning Research

Advantages:

- ⊗ Access to expertise you might not have in-house
- ⊗ Access to information/datasets you might not have
- ⊗ Help uncover people you might not have considered
- ⊗ Enables you to prioritise and approach with an appropriate proposition

Disadvantages:

- ⊗ Not an exact science
- ⊗ Only based on publicly available information — so some missing pieces to the puzzle
- ⊗ More expensive than doing in-house
- ⊗ Data protection

Donor Mapping

- ④ Find links to a specific person/network
- ④ Ask structured questions:
 - ④ Who do you know who cares about xxx?
 - ④ Who do you know who cares about us?
- ④ Targeted asks - research possible links in advance





Step 2: Qualify

Qualifying

We're interested in them

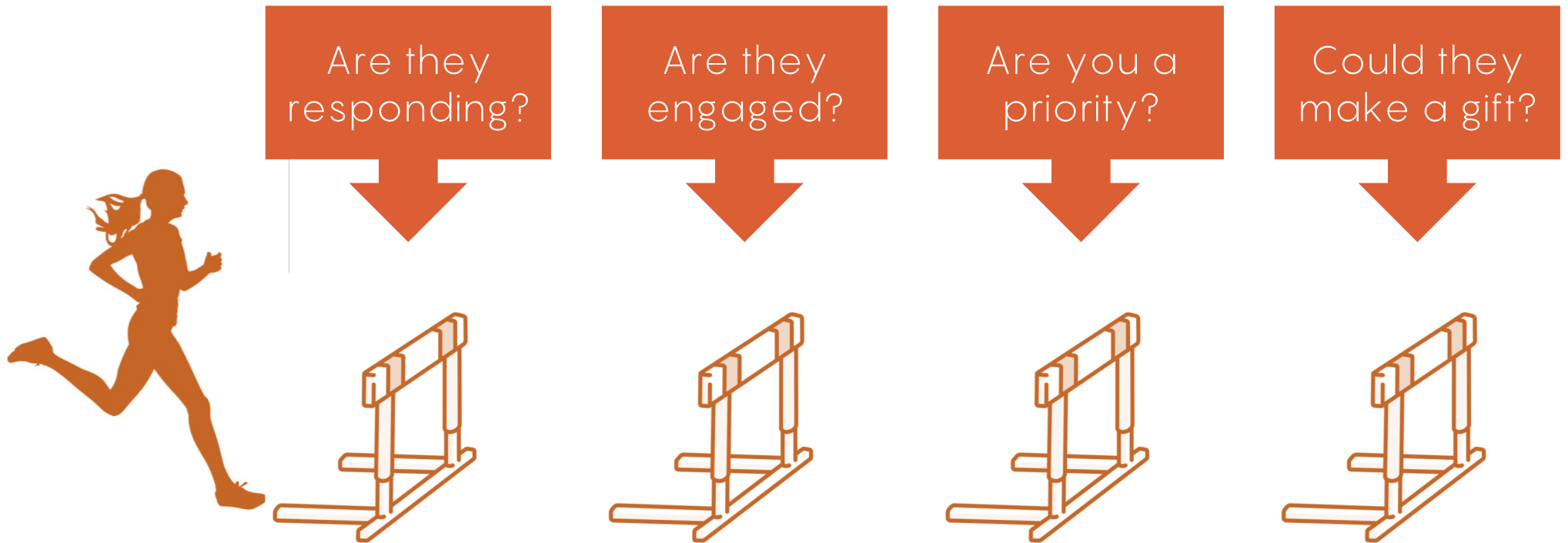
But only 1 in 3 prospects is interested in us

So...

Who should we be spending our time on?

Qualifying

Are they interested in building a deeper relationship with us?



Initial Approach

- ④ Make personal contact and introduce yourself
- ④ Ask to meet do discuss work, future plans, and to show impact of gift
- ④ Could be in-person or virtual – but need to be able to have a conversation
- ④ Multiple attempts across different channels
- ④ If still no response - disqualify

Some Initial Qualifying Questions

Ask questions that get them talking about:

- ⊗ Their relationship with your organisation
- ⊗ Their motivations and passions
- ⊗ Their philanthropic preferences and priorities

Some Initial Qualifying Questions

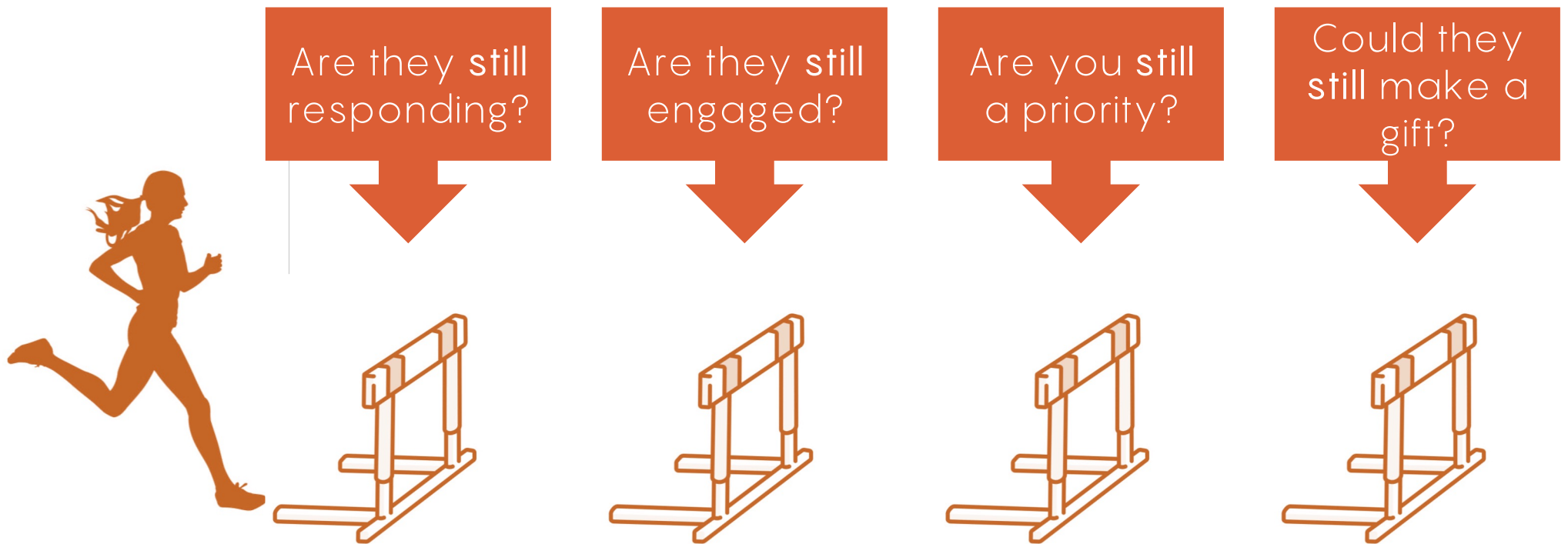
- ① What inspired you to get involved with/donate to our organisation?
- ① Are there particular aspects of our work you're interested in learning more about/getting more involved in?
- ① Which other organisations do you support?
- ① Why is <<other org>> important to you?
- ① Which orgs do you particularly enjoy supporting?
Which give you the best donor experience?



Meeting a Potential Donor

Qualifying is never-ending

Are they **still** interested in building a deeper relationship with us?



What happens to disqualified donors?

- ① Keep engaging at current level?
- ① Find alternative propositions? (Galas? One-off gift?)
- ① Find a better route in?
- ① Keep in (light) touch?
- ① Remove altogether?

Building your portfolio

Rank	Characteristics	% of portfolio	% of time
A	High connection High motivation Medium/High capacity	10%	50%
B	High connection Medium/High motivation Low-medium capacity	30%	30%
C	Some connection Some motivation Some capacity	60%	20%



Step 3a:
Plan
Your
Propositions

What is your proposition?

Patrons
scheme?

Syndicates
& Giving
Circles?

Donation?

Transactional?

Philanthropic?

National Theatre

Patron: £1,500

(£125 per month by Direct Debit)

[Join or renew by Direct Debit](#)

[Join or renew by card](#)

Enjoy a closer relationship with the National Theatre, with a personal contact in the Development Office and invitations to attend private post-show talks with directors.

- Receive the highest level of priority booking
- Book your tickets online, or by email or over the phone with support from the Development team
- Access seats for sold out productions via your personal contact in the Development team*
- Join our creative teams at six events each year, including the Director's Insight series, the Annual Supporters' Celebration, Family Day and NT Revealed**
- Enjoy year round access to the Foyle Room, our private members' bar with river views†
- See your name listed as a Patron on our website and in every Olivier and Lyttelton programme
- Be the first to hear news about productions, casting and events, and receive posted copies of the NT Newsletter

Premier Patron: £3,000

(£250 per month by Direct Debit)

[Join or renew by Direct Debit](#)

[Join or renew by card](#)

Premier Patrons support our ambition to be a theatre for everyone. Enjoy greater access to the Patron ticket allocation and opportunities to hear directly from the performers who bring our stages to life.

All the benefits of Patron, plus:

- Join an additional four events each year, including the opportunity to hear from cast members directly in our series of Cast Talkbacks**
- Secure better access to seats for sold out productions via your personal contact in the Development team*
- See your name listed as a Premier Patron on our website and in every Olivier and Lyttelton programme

National Theatre

Benefactor: £6,000

(£500 per month by Direct Debit)

[Join or renew by Direct Debit](#)

[Join or renew by card](#)

Benefactors enjoy a personal connection with the theatre. Attend opening nights, trips and dinners and get closer to our work and those who make it.

All the benefits of Premier Patron, plus:

- Attend two Opening Nights each year, all of which include a pre-show champagne reception and post-show party with the cast
- Late access to seats for sold out productions via your personal contact in the Development team*
- An invitation to the Annual Directors' Lunch, hosted by Rufus Norris or Kate Varah
- Join our annual trip to the Edinburgh Festival Fringe (with an itinerary designed by the NT)**
- See your name listed as a Benefactor on our website and in every Olivier and Lyttelton programme

Olivier Circle: £12,000

(£1,000 per month by Direct Debit)

[Join or renew by Direct Debit](#)

[Join or renew by credit card](#)

As our closest friends, Olivier Circle members enjoy the highest level of access to our work and the people who make it – and help unlock the National Theatre's full potential.

All the benefits of Benefactor, plus:

- Attend an additional three Opening Nights each year (five in total), all of which include a pre-show champagne reception and post-show party with the cast
- Last-minute access to seats for sold out productions via your personal contact in the Development team*
- An invitation to the Olivier Circle Dinner, a celebration of your support in the company of Rufus Norris, Kate Varah and special guests from across our artistic programme
- Opportunity to attend exclusive dinners with National Theatre artists at venues across London**
- See your name listed as an Olivier Circle member on our website, in every Olivier and Lyttelton programme and on our Boards in the NT foyer

PRODUCTION SUPPORT FROM £5,000+

As a Glyndebourne production supporter, you will be invited to gain an insider view of the creative process through special events and rehearsals. You will also enjoy a tailored relationship with Glyndebourne and year-round benefits.

SUPPORT *PARSIFAL*



OUR FIRST EVER PRODUCTION OF WAGNER'S FINAL OPERA

Director Jetske Mijnsen is known for her thoughtful, psychological productions. Glyndebourne music director Robin Ticciati conducts.

To join the *Parsifal* circle we ask for a gift of £5,000 or above. To join the *Parsifal* syndicate we ask for a gift of £25,000 or above.

SUPPORT *SAUL*



BARRIE KOSKY'S AWARD WINNING PRODUCTION

Theatrical spectacle meets raw emotion in this blazingly original staging. Jonathan Cohen conducts.

To join the *Saul* circle we ask for a gift of £5,000 or above. To join the *Saul* syndicate we ask for a gift of £20,000 or above.

SUPPORT *LE NOZZE DI FIGARO*



A NEW PRODUCTION OF A MOZART MASTERPIECE

Mariame Clément, known for her entertaining yet sophisticated comedies, directs. Riccardo Minasi will conduct.

To join the *Le nozze di Figaro* circle we ask for a gift of £5,000 or above. To join the *Le nozze di Figaro* syndicate we ask for a gift of £20,000 or above.

How you can help

The Museum aims to make its Ancient Egypt and Sudan collections as widely available as possible. Your support will really help us to achieve our goals.

- **£35,000 will enable the department to hire a full-time curator for one year** to specialise in Egypt of the late Period (c. 700–343 BC) – a time of intense cultural interaction with Persia, Assyria, Nubia and Greece, and the development of a new writing system (demotic).
- **£30,000 will create a position to photograph and catalogue 2,500 objects** in the collection, thus making more of the collection accessible to the public through the online database.
- **£10,000 would fund a fieldwork season at Elkab**, where specialists in the department are documenting, researching and conserving decorated tomb chapels of the mid-2nd millennium BC.
- **£5,000 will fund a three-month post-doctoral fellowship** to research and enhance our understanding of the collection, while also developing the skillset and experience of a promising young scholar.
- **£4,000 will fund the scanning and virtual unwrapping of one mummy** in the collection.
- **£3,000 would fund editing work for an issue of British Museum Studies in Ancient Egypt and Sudan**, a biannual academic journal, available free online.
- **£2,000 would purchase a high performance computer** capable of processing high spec graphics that enable curators to view mummy visualisations.



A P O L L O
F U N D R A I S I N G

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Good transactional schemes overcome a barrier...

- ⊗ Financial
- ⊗ Access
 - ⊗ Entry
 - ⊗ Special Events
 - ⊗ Information/Content
 - ⊗ Tickets
 - ⊗ Facilities
- ⊗ Identity/Social Inclusion
- ⊗ Stepping stone to higher gifts



...but transactional schemes can...

- ⊗ Be expensive/inefficient to run
- ⊗ Leave money on the table
- ⊗ Inhibit future growth
- ⊗ Fail to align with real motivations



Laying the Foundations

- ④ Compelling vision & Case for Support
- ④ Project 'business case'
- ④ Gift Ladders
- ④ Senior Staff & Trustee buy-in
- ④ Database/CRM
- ④ Financial Processes

Gift Ladders

	£1,000	£10,000	£100,000
Support quality art	?	?	?
Support young artists	?	?	?
Support outreach work	?	?	?



Step 3b:
Prospect Plans

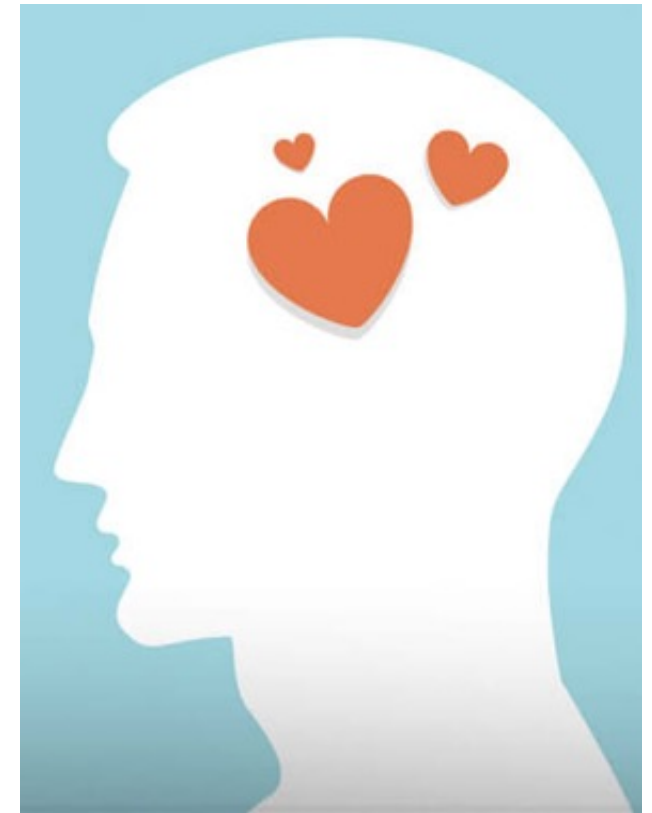
What do donors need to KNOW?

- ④ What is the Need?
- ④ How are they addressing it?
- ④ How much do they need?
- ④ Why me?
- ④ What impact will my gift have?
- ④ Why now?
- ④ What role can I play?
- ④ What are their plans for the future?
- ④ Do I trust the leadership?



What do donors need to FEEL?

- ④ Trust?
- ④ Respect?
- ④ Respected?
- ④ Inspired?
- ④ Excited?
- ④ Engaged?
- ④ Valued?
- ④ Socially comfortable?



What do fundraisers need to know?

- ⊗ What to ask for
- ⊗ How much to ask for
- ⊗ When to ask
- ⊗ How to ask
- ⊗ Who to ask





Introducing Moves Management

Moves Management

A bespoke plan mapping the key 'touchpoints' needed to develop the relationship and fill the gaps. This plan should include

- ④ The specific steps or touchpoints needed to give them the desired knowledge/feeling
- ④ The person responsible for delivering each step
- ④ The timeframe for delivering each step
- ④ The person responsible for ensuring it is complete
- ④ The person responsible for sharing the outcome with the team
- ④ The person responsible for updating the plan



Moves Management Process

1. Map out:
 - ③ What the prospect needs to know
 - ③ What the prospect needs to feel
 - ③ What you need to know
2. Map out where you are now
3. Identify the gaps

Prospect Name: _____ Last updated: _____ By: _____

Do we know?	Details	Suspect?					Know?
Primary motivation?							
Other motivations?							
Focus of ask							
Ask amount							
When to ask							
Who to ask							
How to ask							
They need to know...	Progress to date	Current Status					
		1	2	3	4	5	
		1	2	3	4	5	
		1	2	3	4	5	
They need to feel...	Progress to date	Current Status					
		1	2	3	4	5	
		1	2	3	4	5	
		1	2	3	4	5	

Moves Management Process

4. Consider which touchpoints best address the gaps

- ⊗ Are there common touchpoints that can be addressed collectively?
- ⊗ Is there existing activity that can fill gaps?
- ⊗ Who else needs to be involved?
- ⊗ Are there any time constraints?

Some Common Touchpoints

- ⊗ Peer introductions
- ⊗ Invitations to events
- ⊗ See work first-hand
- ⊗ Formal meetings
- ⊗ Informal meetings
- ⊗ Phone calls
- ⊗ Email approach
- ⊗ Annual Review
- ⊗ Personal Touchpoints



Moves Management Process

5. Schedule touchpoints, aiming for at least one per month per prospect
 - ④ CRM/Database?
 - ④ Project Management software?
 - ④ Digital calendar?
 - ④ Excel sheet?

Each touchpoint should include:

- ④ A clear purpose/intended outcome
- ④ A person responsible
- ④ A timeframe for completion

Moves Management Process

6. Assign tasks to appropriate team members
7. Assign one person to oversee plan
8. Update the plan after each touchpoint and share

Who is on your Major Gift team?

- ⊗ Fundraiser?
- ⊗ Board Members?
- ⊗ CEO?
- ⊗ Artistic Director?
- ⊗ Front-of-House staff?
- ⊗ Finance Manager?
- ⊗ Project Manager?
- ⊗ Box Office staff?
- ⊗ Other supporters?
- ⊗ Volunteers?
- ⊗ Beneficiaries?
- ⊗ Artists?
- ⊗ Marketing?
- ⊗ Wider network?



Step 4:
Cultivate
(aka execute
the plan)

Cultivation Top Tips

- ④ Work to your plan
- ④ Do your Homework
- ④ Know your Options
- ④ Predict tricky questions and Practice your Responses
- ④ Tell stories
- ④ Active listening
- ④ Share your Passion



Ready to take the leap?

Do you think the prospect knows what they need to know, and feels what they need to feel?

Are you confident that you know:

- ⊗ What to ask for?
- ⊗ How much to ask for?
- ⊗ How to ask?
- ⊗ When to ask?
- ⊗ Who to ask?

How much should I ask for?

2-10x
annual
giving
amount?

Base on
capacity?

Show
Gift
Ladder?

Ask
them?

Giving to
other
orgs?

They will
tell you?

Feasibility
call?

Base on
org
need?

Enthusiasm
for
project?





Step 5:
Ask



Making the Ask



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Asking Top Tips - Before

- ④ Be explicit about the purpose of the meeting
- ④ Decide who else will be there
- ④ Find a suitable venue
- ④ Remind yourself why you think this offer is right for this prospect
- ④ Practice!



Asking Top Tips - During

- ④ Build rapport — begin with small talk
- ④ Remind them of the need for your work/project and your ambition
- ④ Tell stories to bring it to life
- ④ Connect to the things you know they care about
- ④ Be specific about the amount and the impact



Asking Top Tips - After

- ⊗ Stop talking until they respond!
- ⊗ Thank them (whatever the outcome)
- ⊗ Set specific next steps
- ⊗ Confirm what has been agreed





Step 6:
Close

Closing a Major Gift

- ⊗ Follow up – confirm what was agreed
- ⊗ Further negotiation?
- ⊗ Internal Due Diligence/Gift Acceptance Process?
- ⊗ Gift agreement?

Gift Agreement

- ⊗ Details of gift
- ⊗ Payment schedule and terms
- ⊗ Any conditions on use of the gift
- ⊗ Agreement on how the gift will be credited and publicised
- ⊗ Terms around naming rights? (Including removal of naming rights)
- ⊗ Agreement on what will happen to the gift if the project doesn't proceed
- ⊗ Details of any reporting requirements



Step 7: Thank and Steward

Make your Thank You SUPER!

Speedy

Unique

Passionate

Engaging

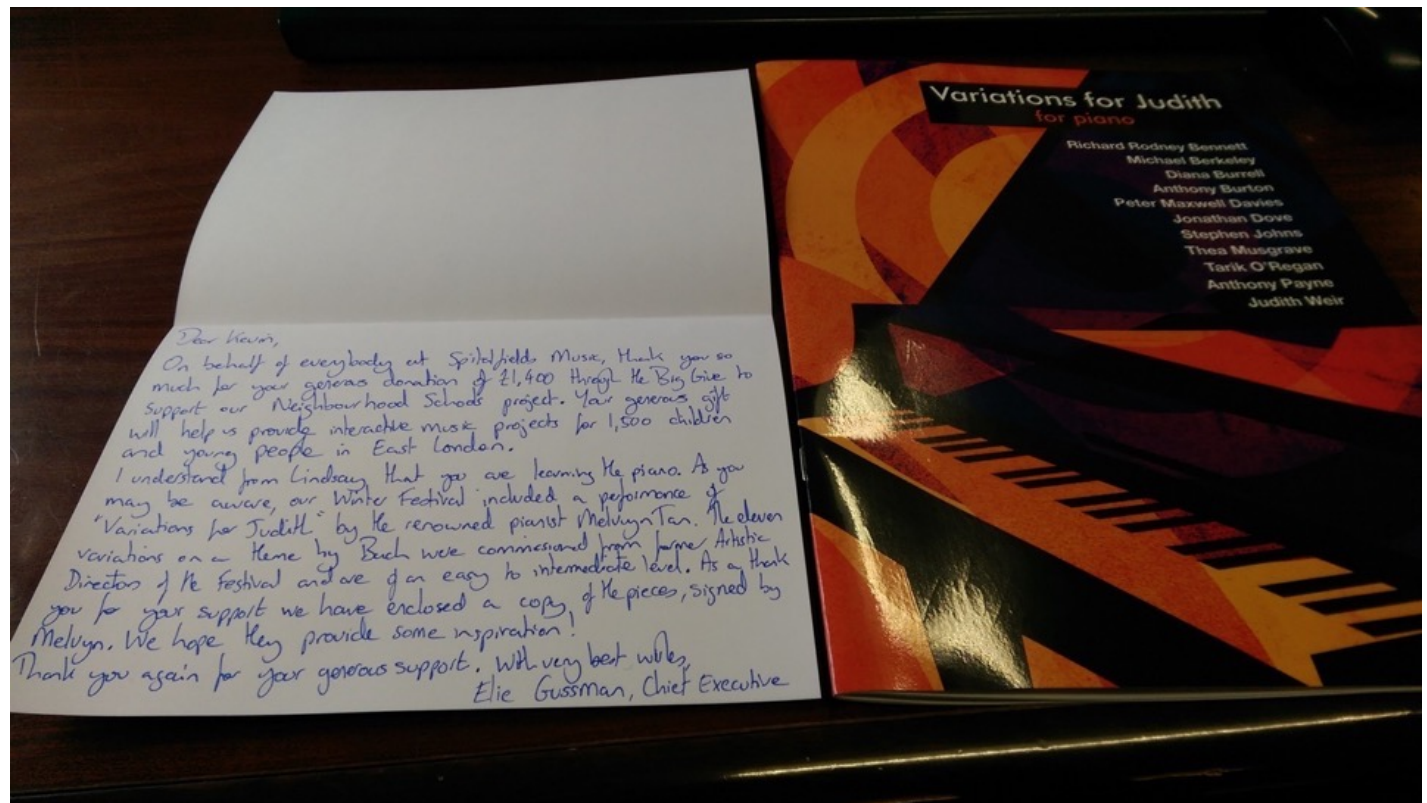
Repeated



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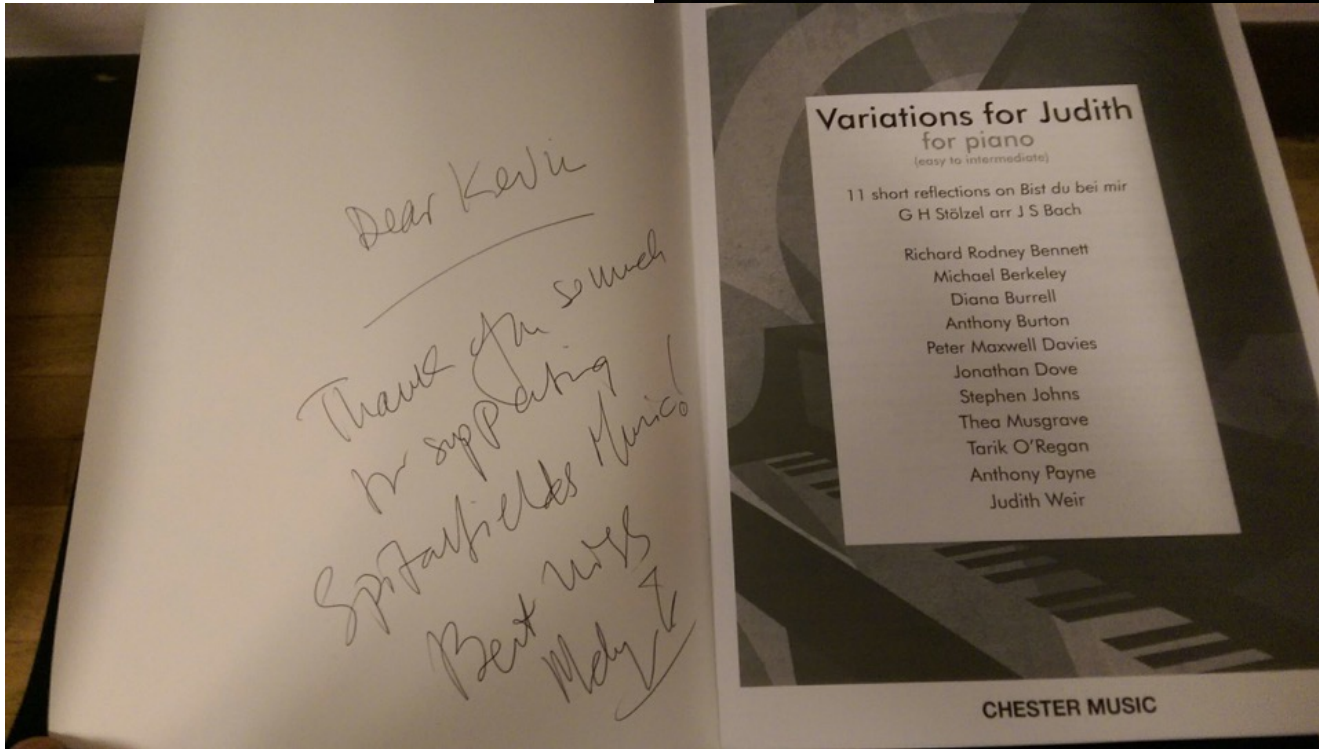




Dear Kevin,
 On behalf of everybody at Spitalfields Music, thank you so much for your generous donation of £1,400 through the Big Give to support our Neighbourhood Schools project. Your generous gift will help us provide interactive music projects for 1,500 children and young people in East London.
 I understand from Lindsay that you are learning the piano. As you may be aware, our Winter Festival included a performance of "Variations for Judith" by the renowned pianist Melvyn Tan. The eleven variations on a theme by Bach were commissioned from former Artistic Director of the Festival and are of an easy to intermediate level. As a thank you for your support we have enclosed a copy of the pieces, signed by Melvyn. We hope they provide some inspiration!
 Thank you again for your generous support. With very best wishes,
 Elie Gussman, Chief Executive

Variations for Judith
 for piano

Richard Rodney Bennett
 Michael Berkeley
 Diana Burrell
 Anthony Burton
 Peter Maxwell Davies
 Jonathan Dove
 Stephen Johns
 Thea Musgrave
 Tarik O'Regan
 Anthony Payne
 Judith Weir



Dear Kevin
 Thank you so much
 for supporting
 Spitalfields Music!
 Best wishes
 Melvyn

Variations for Judith
 for piano
 (easy to intermediate)

11 short reflections on Bist du bei mir
 G H Stölzel arr J S Bach

Richard Rodney Bennett
 Michael Berkeley
 Diana Burrell
 Anthony Burton
 Peter Maxwell Davies
 Jonathan Dove
 Stephen Johns
 Thea Musgrave
 Tarik O'Regan
 Anthony Payne
 Judith Weir

CHESTER MUSIC

and heritage organisations
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Other
resources

Prospect Research Companies

- ④ Factory =
<https://factory.com/>
- ④ Giving Insight =
<https://www.givinginsight.org/>
- ④ Prospecting for Gold -
<https://prospectingforgold.co.uk/>

See also these useful articles on Data Protection and Research -
<https://prospectingforgold.co.uk/2025/02/this-is-how-to-stay-gdpr-compliant-while-undertaking-major-donor-research/>

<https://prospectingforgold.co.uk/2023/02/researching-individuals-and-gdpr-compliance/>

Gift Agreement Guidance

- ④ <https://bloomerang.co/template/gift-agreement/>
- ④ <https://www.philanthropyworks.org/gift-planning-field-guide/gift-administration/gift-agreements>
- ④ <https://www.northampton.ac.uk/wp-content/uploads/2023/07/donor-relations-and-acceptance-of-donations-policy-and-procedure.pdf>
- ④ <https://www.insidephilanthropy.com/ipcontent/donor/inside-philanthropy-donor-brief-gift-agreements.pdf>

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