

Major Donor Kick Start Programme

Money Tree Fundraising



Who are we?

Money Tree Fundraising works with charities to set up and grow fundraising from trusts, companies and wealthy individuals. In 2015 we were named **Best Strategic/Fundraising Consultancy** by the Institute of Fundraising for our work with grassroots charities. We understand the challenges smaller charities face with specialist knowledge, capacity, skills.

We are fundraising practitioners as well as consultants. Our expert fundraisers have combined experience of all types of charity and have raised more than £46m over their cumulative 227 years' experience.

We are on a mission to embed sustainable high value fundraising within charities of all size, through our expert advice and delivery.

Why major donor fundraising?

According to the Sunday Times Rich List, the proportion of the UK's wealthiest people giving at least 1% of their fortune to charity is on the rise, with 106 such philanthropists in 2015, a new record in the list's 13-year history.

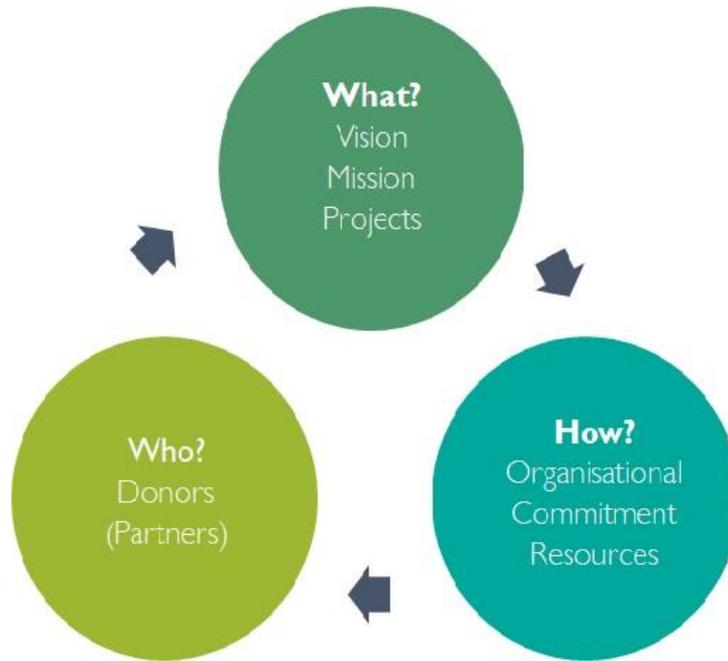
Major donor fundraising is suitable for all charities, whatever your size. It is a technique for building relationships with people in order to secure their significant and ongoing support, which will usually be through large gifts, advice, introductions to other significant donors and more.

A single major donor can have a huge impact on a charity of any size. A major donor programme can consist of a single donor or of hundreds of donors; this way of fundraising is the most straightforward to scale according to your capacity and your connections.

The secrets to successful major donor fundraising

- Potential donors
- Compelling donor-friendly proposals
- Genuine relationships
- Asking for a gift

When you know **who** to approach, **how** to develop meaningful relationships with these people and you **ask** for the gifts, you will raise more money to deliver your organisation's vision.



At Money Tree Fundraising **we know major donor fundraising**; we have worked with dozens of organisations keen to develop major donor programmes. They have shared the same problems before working with us:

- Not knowing how to find the donors to approach
- Not writing compelling proposals that work for donors
- Not building strong relationships
- Not asking for the gift
- Not being able to measure or report back on the impact of a gift
- Not being consistent over the years

The Major Donor Kick Start programme delivers:

- Identification and qualification of potential donors
- A strong written proposal to persuade donors
- Training in the art & science of donor cultivation for you, your team and your leadership
- Coaching in making the ask
- Workshops with trustees and senior staff to debunk myths
- Planning for success
- Ongoing expertise to keep the programme on track long term

Major Donor Kick Start

In partnership with you, our tried and tested approach will take you through the stages essential for setting up your major donor fundraising programme:

1. **Immerse** – we assess where you've come from, what you've done, what has worked (or not) and what you've got. We need to assess your senior staff, trustees, patrons etc. for their fundraising readiness and networks.
2. **Propose** – we package your work into a proposal that works for donors, with a clear budget, ensuring that you can measure success against pre-set objectives. We ensure that you have the supporting documentation, processes and procedures that donors will need to see.
3. **Research** – we will advise you on how best you can identify potential donors from your database or from external sources. *
4. **Engage** – we speak to potential supporters to test the proposal and the financial assumptions we've made so far. We are not asking them for a donation at this point but the responses we gather here are strong indicators for future support and starting the relationship-building journey.
5. **Plan** – we take the results of the research, the interviews and the review work and make recommendations about your major donor potential. This will include an outline plan to achieve success and an outline budget for the costs of raising the money.
6. **Launch** – we stay at your side as you launch your programme, delivering breakthrough sessions and training to your senior leadership and team on cultivation and asking.
7. **Support** – we will continue to act as your mentor through the first months of implementation, giving you piece-of-mind that this plan won't sit on the shelf gathering dust. We are at your side to develop the fundraising programme with you, providing training, ongoing guidance, expert opinion and a sounding board to keep your investment on track.

At the end of the Major Donor Kick Start you will have launched your major donor programme and you will have the skills, tools and support you need to deliver consistent major donor fundraising that will raise more money for your organisation.

"At Gingerbread we knew that major donor fundraising presented a good opportunity to diversify our income but also knew we needed more expert input before deciding on the type and level of resources to commit. Laura Perkins from Money Tree Fundraising provided the perfect solution by taking us through four clear stages to set-up our major donor fundraising programme. She undertook a feasibility study, developed our case for support, wrote a practical strategy and most importantly helped us to begin implementing it. She was sensitive to the way we worked and ensured she engaged everyone in the process – which made her a pleasure to work with. I had no experience of major donor fundraising at the outset and I have been surprised by how much we have achieved in 6 months. I think she has helped us make a break-through as an organisation and even helped us to recruit our first major donor fundraiser."

Nigel Purkis, Gingerbread

* the additional cost that may be required for this aspect of the work is not included in our package as each organisation's situation is so different.

Cost and Duration

This programme takes 12 weeks to complete followed by a further period of between 3 and 6 months of ongoing support. We offer three levels of engagement with our Major Donor Kick Start programme.

	BRONZE	SILVER	GOLD
Price ex. VAT	£4,999	£8,250	£9,999
Immerse	Self-review using our tools	We will review your current situation	
Propose	Expert critique of your proposal, budget and gift table created using our tools	We will write your proposal, create a donor-friendly budget and a gift pyramid	
Research	We will work with you to identify potential major donors, be that from your database or from external research agencies		
Engage	Individual interviews OR focus group and online survey		Individual interviews AND focus group and online survey
Plan	Expert critique of your outline plan created using our tools	We will write an outline plan to raise the money, project how long it will take and how much it will cost	We will report back on our findings face-to-face as well as in writing
Launch	-	team training: Major Donor Process breakthrough session: Understanding Major Donors for Leaders	team training: Language of Relationships and Asking
Support	Half-hour mentoring calls every week for the first 12 weeks after launch		
	-	-	Monthly mentoring calls for a further 6 months

Results

By partnering on the Major Donor Kick Start programme you will launch your major donor programme in a sustainable way, based on feedback from your donors, and in a manner, that is suitable to the size and stage of your organisation. You will receive:

- An assessment of your organisation's opportunity within major donor fundraising
- A persuasive proposal
- Identification and qualification of potential donors
- Preparation for success through engagement with potential supporters
- Planning for success
- Training in donor cultivation and asking for you, your team and your leadership
- Ongoing support as you implement the plan

Next steps

**Book an exploratory call with us to discover how we can help you.
findoutmore@moneytreefundraising.co.uk**

"At Disaster Emergency Committee (DEC) our challenge is always the uncertainty of when the next emergency will hit. Money Tree Fundraising was great at understanding our needs and the unique way we work. They quickly helped us understand our major donor fundraising potential and provided valuable insights into our strengths and the areas that we could develop. More than that, they provided us with a really practical action plan that was sensitive to the capacity and resources we have available."

Lisa Robinson, Disasters Emergency Committee



The Money Tree Fundraising Major Donor Experts

Our team has experience raising funds for every type of charity and beneficiary group:

- Animals
- Armed forces
- Community development
- Culture
- Disability
- Education
- Environment
- Health
- Higher education
- Hospice
- Housing
- International
- Mental health
- Poverty
- Recreation
- Religion
- Rights
- Sport

- Children & young people
- Older people
- Specific groups

Here are some of the Money Tree Fundraising team that specialise work on major donor fundraising:

Beth Upton founded Money Tree Fundraising in 2010 following her success at leading the £25m capital appeal to rebuild the Marlowe Theatre in Canterbury. She has raised multi-millions for the causes for which she has worked over the last 15 years. Beth's expertise is across all high-value disciplines: trust applications, corporate partnerships, soliciting major donors, high-value events and prospect research.

Mike Bartlett is an experienced fundraising professional, having led teams at large international aid agencies and smaller UK-focussed charities. He has a passion for high level giving, especially developing major donor programmes for smaller charities. Most recently Mike has developed sustainable major donor programmes from scratch at three health-focused charities.

Money Tree Fundraising Ltd
Office 7, 35-37 Ludgate Hill
London
EC4M 7JN

findoutmore@moneytreefundraising.co.uk

<http://www.moneytreefundraising.co.uk>

<https://twitter.com/MoneyTreeFR>

<https://www.facebook.com/MoneyTreeFR/>

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