Chat Summary
Major Donors' Voices: Busting the Myths Webinar

Questions asked and answered in the chat

What's the best email address format to use for major donor outreach — personal or generic?
The session raised the point that named personal email addresses (e.g. name@charity.org.uk) signal a more professional, approachable presence than generic addresses (info@ or contact@). Attendees noted the practical challenges this creates for smaller organisations with limited staff — particularly around staff turnover, holidays, and sickness. Practical workarounds discussed included: setting up email forwarding from personal addresses to a shared inbox, assigning a named person to monitor website accuracy during transitions, and reserving personalised addresses for key roles such as your fundraiser. Cancer Research UK's philanthropy page was noted as an example of a named contact approach (director name and phone number, no generic email).

Is there a definition of a 'major donor'?
No single definition was given — attendees generally agreed it's best defined by each organisation relative to its own range of gifts and scale.

What does the donor matrix shared in the session involve?
An attendee shared that their organisation uses a donor matrix to give prospects an overall capacity score, drawing on factors including donation amount, recency of last donation, and last communication received. This helps rank and prioritise donors. The matrix is essentially an extension of the RFM (Recency, Frequency, Monetary) approach — a link to a useful overview was shared: https://dataro.io/en-gb/blog/donor-segmentation-understanding-the-rfm-approach. The attendee noted they would look into sharing the template more widely after the session.

How do you engage potential donors who have sponsored someone in a challenge event but haven't given directly?
One suggestion was to send a warm, personalised thank-you email connecting their sponsorship to the wider cause, followed by an invitation to a conversation — coffee or a phone call — to explore further involvement.

How long do you persist with a prospect who isn't responding?
One attendee shared their experience of being ignored for a year before eventually going to lunch with the prospect, who subsequently gave £50,000 — without being asked directly. The takeaway was not to take non-responses personally and to keep the relationship warm over the long term.

What is the best approach for a first meeting with a major donor prospect?
Attendees broadly agreed: don't lead with a formal presentation unless asked. Keep it informal and conversational. Have a couple of case studies ready to bring the work to life, and a range of funding options to hand in case the donor asks directly how they can help. Ask questions, listen to their motivations, and treat the meeting as a relationship-building exercise rather than a pitch.

How do you re-engage a donor who has given for years but has recently stopped?
This was raised but not fully answered in the chat — the suggestion was to return to relationship-building basics and reconnect around impact rather than a financial ask.

How do you approach due diligence on potential donors?
One attendee recommended having a clear Acceptance of Donations policy in place that can be shared early — before a donor has started engaging too deeply — to avoid difficult conversations later.

Is it worth sending a video of your charity's work to donors?
Yes — it was suggested as a light-touch engagement opportunity, particularly if you have different versions. Asking the donor for their opinion on the video is a useful way to involve them further.

Resources, tools, and frameworks shared

- **Donor matrix / RFM approach -** a scoring template to help prioritise prospects based on recency, frequency and monetary value of giving. Overview here: https://dataro.io/en-gb/blog/donor-segmentation-understanding-the-rfm-approach
- **Summit Fundraising free resources -** a range of tools and resources shared during the session: https://summitfundraising.co.uk/free-resources/
- **The 3 Essentials Guide -** referenced by Louise during the session and shared in the chat: https://mailchi.mp/9b567c265ee2/3essentials
- **fewandfar.co.uk Impact Optimiser -** a free tool mentioned by an attendee as producing excellent information and advice: **https://www.fewandfar.co.uk/impact-optimiser**
- **Beth Breeze -** researcher named in the chat in response to a question about a lecturer or researcher referenced during the session.
- **Jen Shang -** author referenced during the session in connection with a book on philanthropy.
- **FROGS -** a network mapping acronym mentioned by an attendee (referenced from a previous Fundraising Everywhere event). Suggested letters: Family, Recreation, Occupation, Goals, (S unknown) — useful for mapping who in your network might be able to make introductions, offer donations, or support in other ways.

Notable tips shared by fellow attendees

- **Relationship over transaction.** Move away from thinking about money first — build genuine rapport and the funding tends to follow. Treat donors as people you genuinely care about, not as a means to an end.
- **Smaller charities can be an advantage.** Some major donors actively prefer smaller organisations where their gift has a more visible impact and doesn't feel like it's going towards salaries or marketing.
- **Trustees don't have to be wealthy to add value.** Lived experience, professional expertise, and connections within the charity sector are all valuable. A fundraiser on a trustee board can make introductions across the sector, not just to donors.
- **Set expectations with trustees at recruitment**. If you want trustees to open their networks, make that expectation explicit from the start of the recruitment process.
- **Network mapping as a team exercise.** One attendee described running network mapping exercises across staff and trustees, which consistently revealed connections nobody knew the organisation had — for introductions, donations, marketing support and more.
- **Hope, not just urgency.** There was an interesting discussion about the difference in messaging tone for major donors vs. smaller donors — with several attendees noting that hope-based communication tends to land better at the higher end, while urgency can be more effective for smaller gifts. Emotions trigger giving, but those emotions don't have to be negative.
- **Events don't have to be swanky.** Intimate, low-cost networking events at your own base — with frontline workers speaking and ex-clients sharing their stories — can be more effective than formal galas for building major donor relationships.
- **Inviting donors to events even when they can't attend.** One attendee noted that donors who don't attend events have still responded positively to being invited — the invitation itself signals they are valued.
- **Rotary clubs as a starting point.** For organisations with limited existing networks, approaching Rotary clubs (where more affluent individuals tend to be members) — offering to come and speak rather than ask — was suggested as a way in.